Oracle CRM On Demand Online Help

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Contents

1 Getting Started

Welcome to Oracle CRM On Demand, the smart customer relationship management solution that you access over the Web. Oracle CRM On Demand helps you to manage all your company's sales, customer service, and marketing information:

- If you are a sales professional, use Oracle CRM On Demand to optimize your sales efficiency and effectiveness by analyzing your sales strategy, forecasting more accurately, and sharing critical sales information across your team.
- If you are a customer service representative, use Oracle CRM On Demand to maximize your customer satisfaction and service performance by tracking accounts, managing service requests, identifying cross-selling and up-selling opportunities, and providing solutions to customer inquiries.
- If you are a marketing representative, use Oracle CRM On Demand to capitalize on your marketing efforts by generating more leads, assigning leads automatically, and tracking campaign outcomes quantitatively.
- If you are an executive, use Oracle CRM On Demand to manage all areas of your business by gaining insight into your sales' outlook, quickly resolving critical business issues, and performing complex analyses.

In Oracle CRM On Demand, your information is grouped into the following main areas:

Calendar and Activities. Tracks your activities, including phone calls, events, and to-do lists.

Campaigns. Manages marketing campaigns and generates qualified leads and opportunities.

Leads. Tracks leads for new sales opportunities and automates the lead conversion process.

Accounts. Tracks companies with whom you conduct business.

Contacts. Tracks people associated with your accounts and opportunities.

Opportunities. Manages potential revenue-generating opportunities.

Forecasts. Generates forecasts to project quarterly revenue based on existing opportunities.

Service Requests. Manages customer requests for products or services.

Partners. Tracks the external companies or contacts at companies who sell or service products belonging to your company (Oracle CRM On Demand Partner Relationship Management Edition).

Partner Programs. Tracks the requirements and benefits for companies that are part of your company's partner programs (Oracle CRM On Demand Partner Relationship Management Edition).

Solutions. Stores answers to common questions or service issues.

Analytics. Provides access to prebuilt reports and dashboards in the Analytics catalog, and allows you to create reports and dashboards.

Additionally, industry-specific solutions contain these record types:

Vehicles. Tracks service history and sales history of vehicles (Oracle CRM On Demand Automotive Edition).

Dealers. Tracks associations with dealers (Oracle CRM On Demand Automotive Edition).

Events. Manages events and invitees (Oracle CRM On Demand Life Sciences Edition)

Funds. Manages fund requests, credits, and approvals (Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition).

Portfolios. Tracks portfolio accounts (Oracle CRM On Demand Financial Services Edition).

Households. Tracks information for a group of related contacts (Oracle CRM On Demand Financial Services Edition).

You may also see other record types depending on the industry-specific solutions you have implemented.

NOTE: Your company administrator can rename the standard record types, so you might see different tab labels. For example, your company administrator might change “Accounts” to “Companies.” Your company administrator can also add custom record types, as required.

What To Do First

Your company administrator has probably imported company-wide records for accounts, contacts, leads, and so on. Follow these instructions to get you up and running quickly:

- Signing In as a New User (on page 27)
- Updating Your Personal Details (on page 734)
- Displaying Your Tabs (on page 749)
- Importing Your Contacts (on page 291)
- Creating Records (on page 51)
- Finding Records (on page 74)
- Updating Record Details (on page 115)
- Linking Records to Accounts (on page 270)

TIP: Click the Help link from any page for information regarding procedures, concepts, and guidelines specific to the record type you are working with. From any Help window, you can access the PDF version of the help content, allowing you to print a range of topics or the entire help content.

Note for first-time users:

- Your administrator might set up some alert messages so that they appear in separate windows when you sign in to Oracle CRM On Demand. If any alert windows appear when you sign in, then you must close the alert windows by clicking OK in each of them before you can interact with Oracle CRM On Demand. For more information about pop-up alert windows, see Reviewing Your Alerts (on page 42).
- If the Activity Notification field settings at user level or at company level allow you to receive pop-up reminders, then when you sign in to Oracle CRM On Demand, the Activity Reminder pop-up window displays any reminders that are due for activities that you own or on which you appear in the list of users. If any alert windows appear when you sign in, then you must close the alert windows before you can interact with the Activity Reminder pop-up window. For more information about the Activity Reminder pop-up window, see About Activity Reminders (on page 200).
- You might not see data in reports for the first 24-hour period after signing in because most reports are updated nightly. For example, the reports appearing on the Accounts, Contacts, and Opportunities Homepages will not show data until after that initial period.
- You may not see forecasts, either, because forecast records are generated once a week or once a month. When generating forecast records, the system checks several fields in your records to determine which information to include in the forecast calculations. Therefore, forecast records don’t appear until the specified period has elapsed and data exists to include in the forecast.

About Running Other Applications

Other applications running in the background might interfere with Oracle CRM On Demand. For example, pop-up blockers can cause your mouse to lock. If you encounter some unconventional behavior, make sure these applications are *not* running:

- Virus checkers
- External Java Runtime Environments
- Pop-up blockers
- External toolbars for your browser

NOTE: Ensure that your browser settings allow JavaScript to run and pop-up dialog boxes to display.

Signing In as a New User

To sign in as a new user in Oracle CRM On Demand, you must have a temporary URL for Oracle CRM On Demand and a temporary password. Oracle CRM On Demand sends this information to you by email, in two parts:

- The first email contains the temporary URL that you use to access Oracle CRM On Demand for the first time.
- The second email contains your temporary password.

Depending on how your company administrator sets up your user account, the email that contains your temporary password might also contain your user ID.

NOTE: Your user sign-in ID is shown on the Oracle CRM On Demand page after you sign in for the first time. Although you do not require your user ID the first time that you sign in to Oracle CRM On Demand, you must have it to access Oracle CRM On Demand after the first time you sign in. Therefore, it is recommended that you make a note of your user sign-in ID for future reference.

When you sign in for the first time, you are asked to set up a number of security questions. Take note of the security questions and answers that you set up. If you later forget your password, you will be required to answer the security questions to reset your password. For more information about resetting your password, see Retrieving Your User Sign-In ID or Resetting Your Password (on page 185).

You can change your security questions at any time in Oracle CRM On Demand, for more information, see Setting Up Your Security Questions (on page 747).

To sign in as a new user

1. Click the Oracle CRM On Demand URL that you received in an email.
2. On the Sign-In page, enter the temporary password you received in an email.
3. Make a note of your user sign-in ID, which is shown in the User Sign In ID field on the Password Update page.
4. On the Password Update page, enter a new password of your choice in the New Password field, and then enter it again in the Verify New Password field.

   TIP: Be sure to make a note of your password to avoid repeating this task.

5. In the My Security Questions page, select the questions that you want to use as your security questions, and enter the answer for each question.

   The number of security questions that you must set up is determined by your company administrator.

   NOTE: Take note of the security questions and answers that you set up.

6. Save your security questions.

   My Homepage displays the information that you require to start using Oracle CRM On Demand. The tabs and features that you see by default depend on the role that you are assigned by your company administrator.

About the Interface

Oracle CRM On Demand is built around a Web page interface. If you are familiar with the Web, the look and feel of the user interface will be familiar to you. All pages in Oracle CRM On Demand share the same basic, interface framework.

TIP: In the Internet Explorer browser, performance is better if you deselect the check box for the Do Not Save Encrypted Pages to Disk option. If this option is selected, JavaScript code is not cached and must be downloaded every time. In Internet Explorer Version 6 and later, this option is available under the Tools menu. From the Tools menu, select Internet Options, then Advanced.

How Themes and Theme Styles Determine the Appearance of the User Interface

In Oracle CRM On Demand, the background color, hyperlink color, text color, tab style, and so on that you see in the user interface are determined by the theme that you use. Two theme styles are available in Oracle CRM On Demand: the classic style and the modern style. If you typically use a tablet computer to work with Oracle CRM On Demand, then you might find that a modern style theme is more consistent with user interfaces for other applications on your tablet computer. For example, in themes that have the modern style, the tabs that you use to access record-type homepages are presented as buttons. Several predefined themes are available: some in the classic style and some in the modern style. Your administrator can also create custom themes in either style.

The following table describes some of the differences in the appearance and functionality of the user interface with the different theme styles.

NOTE: The instructions provided in the online help typically reflect the functionality in themes that have the classic style.

User Interface Area	Classic Style	Modern Style
Action bar: Menu	The Action bar icon (three horizontal lines) appears immediately to the left of the tabs on your Oracle CRM On Demand page. To show or hide the Action bar, click the Action bar icon.	The Action bar icon (three horizontal lines) appears in the global header on each page in Oracle CRM On Demand. To show or hide the Action bar, click the Action bar icon.
Expand and collapse icons in Action bar and Detail pages	To expand a section, click the plus (+) icon beside the section title. To collapse the section, click the minus (-) icon.	To expand or collapse a section, click the section title or the arrows beside it.

User Interface Area	Classic Style	Modern Style
Global header	Not applicable	Your administrator determines what is available in the global header. For example, you might see an icon that allows you to open the Search section of the Action bar. In the standard application, you can access the Create section through the plus icon (+) in the global header. However, depending on how your administrator sets up the global header, you might see a different icon for the Create section. To open the list of the record types that you can create, click the icon for the Create section. Use the down and up arrows to find the record type that you want, and then click the name of the record type. If you want to close the list without selecting a record type, then click the page outside the menu. Alternatively, you can open the list of record types by resting your pointer on the icon for the Create section, and if you want to close the list without selecting a record type, then move your pointer away from the list.
Global links	Global links across the top of each page allow you to do the following: ■ Access resources such as the online help and the Deleted Items page ■ Access the pages where you can configure and personalize Oracle CRM On Demand ■ Sign out Global links to information about Oracle CRM On Demand, such as service information, appear at the bottom of each page. Your administrator determines which global links are available to you.	The global links and the Sign Out button are available in a menu under your user name at the top-right corner of each page. To open the menu, click or rest your pointer on your user name. Your administrator determines which global links are available to you.
Related information links and head-up display	If the head-up display functionality is turned on, and if the Support Head-up Display Settings check box is selected	If the head-up display functionality is turned on, and if the Support Head-up Display Settings check box is selected on your theme, then links to the related

User Interface Area	Classic Style	Modern Style
	on your theme, then links to the related information sections of the Detail pages are available in the head-up display at the bottom of your browser window.	information sections of the Detail pages are available in the head-up display at the bottom of your browser window. Buttons are provided at the right of the Detail page to allow you to go directly to the related information sections on the page. If there are more buttons available than can be displayed at one time, then you can use the arrows provided to display the other available buttons. To go to a related information section, click the button for that section. The buttons for the related information sections are always available, even if the head-up display functionality is not turned on, and the Support Head-up Display Settings check box is not selected on your theme.
Tabs for accessing record homepages and My Homepage	The tabs can have rounded edges or straight edges, or they can be stacked so that they overlap. If there are more tabs in your layout than can fit across the page in your browser window, then an arrow appears next to the far right tab. Clicking the arrow opens a list from which you can select any tab that is available to you but is not currently visible in your browser window. **NOTE:** If your browser window is less than 1024 pixels wide and some of your available tabs are not visible, then a scroll bar appears at the bottom of the page, allowing you to scroll to the arrow that opens the list of available tabs.	The tabs appear as buttons. If there are more buttons in your layout than can fit across the page in your browser window, then you can use the arrows provided to display the other available buttons. For example, if 15 buttons are available to you but only six buttons fit across the page, then you can click the right arrow to display the second set of six buttons, and click it again to display the remaining buttons. A full set of buttons is shown each time you scroll, so that in this example, you first see buttons 1 through six, then buttons 7 through 12, and finally buttons 10 through 15. You can then click the left arrow to move back through the buttons, six buttons at a time.

Other differences in the look and feel of the theme styles include the following:

- Some of the icons are different in the classic and modern theme styles. As an example, in themes that have the classic style, an up arrow icon is used to indicate high-priority tasks in task lists. In themes that have the modern style, an exclamation mark icon is used.
- There are differences in the appearance of the Calendar pages in the theme styles. For more information, see About Calendars and Theme Styles (on page 189).

About Default Themes and Tablet Themes

You can select two themes in your personal profile, a default theme and a tablet theme. The default theme is automatically used when you sign in to Oracle CRM On Demand using a desktop or laptop computer. The tablet theme is automatically used when you sign 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. If you do not select a default theme and a tablet theme in your personal profile, then the themes that are specified for your user role are used, and if no themes are specified for your user role, then the themes that are specified for your company are used. If a tablet theme is not specified at any level, then your default theme is used. For information about selecting themes, see Setting Your Theme (on page 743).

About Switching Between Your Default Theme and Your Tablet Theme

A global link allows you to switch between your default theme and your tablet theme, if both of the following conditions are true:

- A tablet theme is specified in your personal profile, or for your user role, or at company level.
- Your default theme and the specified tablet theme are not the same.

After you switch between themes, the new theme is used each time that you sign in to Oracle CRM On Demand from the same browser on the same computer, as long as you are signed in to the same user account on that computer. However, if you sign in to a different user account on the same computer, and then sign in to Oracle CRM On Demand, then your default theme or tablet theme is used as appropriate for the computer. Similarly, if you sign in to Oracle CRM On Demand from the same computer using a different browser, or if you sign in from a different computer, then your default theme or tablet theme is used as appropriate for the computer.

Action Bar

Your company administrator assigns an action bar layout to each user role. Your company administrator can also make the Action bar unavailable to your user role.

If the Action bar is available to your user role, then it appears on the left side of all Oracle CRM On Demand pages by default. You can hide and show the Action bar as required. For more information, see About Showing or Hiding the Action Bar (on page 39).

The Action bar can contain some or all of the following sections:

- Message Center

  The Message Center section contains notes for yourself, notes received from other users, and notes added to the records to which you subscribe. For more information about the Message Center, see Working with the Message Center (on page 43).

  The Message Center only appears if the company profile has Message Center enabled.
- Search

  The Search section lets you find existing records. For example, you can perform a search to determine if a record exists before creating one, thereby reducing the duplication of records. For instructions on using the Search section, see Searching for Records in the Action Bar (on page 85).
- Create

  From the Create section, you can open a form to add a new record. The form works independently of the main Web pages so you won’t lose your place within the application.

  For example, you can create an opportunity from the Create section of the Action bar while you are updating information in an account in the main section of the Oracle CRM On Demand page. When you expand the Create section of the Action bar and click Opportunity, a form opens. You can then enter the required opportunity information in the form, and save the record. The new opportunity is saved to the database and you can continue updating the account information.

  For instructions on using the Create section, see Creating Records (on page 51).
- Recently Viewed

The Recently Viewed section provides links to the 10 most recently viewed, edited, or created records, including records from previous sessions. Drilling down to the Detail page for a record triggers that record's inclusion in the Recently Viewed section.

This feature allows you to easily access your active records. You can view a longer list by clicking Show Full List to open the Recently Viewed page. In that page, you can see a list that includes up to 10 of the records that you most recently viewed, for each record type. You can sort and filter the records in the list by record type. You can return the list of records to its original order by clicking the heading of the Order column. The Keywords column in the Recently Viewed page shows the values (if any exist on the record) in some of the fields that support type-ahead search in targeted searches in the Action bar. For more information about type-ahead search and a full list of the fields that support it, see Support for Type-Ahead Search in Targeted Search (on page 87).

If you delete a record, it is removed from the Recently Viewed list. If another user deletes a record, it remains in the Recently Viewed list, and if you select the record, a message is displayed informing you that the link no longer exists.

NOTE: If you close the browser window to exit Oracle CRM On Demand instead of clicking the Sign Out link, then when you sign in again to Oracle CRM On Demand, the records that you viewed during your last session might not appear in the Recently Viewed section of the Action bar. It is recommended that you always use the Sign Out link to exit Oracle CRM On Demand.

- Favorite Records

  The Favorite Records section provides links to the records that you have marked as your favorites. This feature allows you to quickly access the records that you use most often. The Favorite Records section in the Action Bar can contain up to 10 records at a time. You can view a complete list of your favorites by clicking the Show Full List link. When you click the Show Full List link, the Favorite Records page opens, and you can manage your favorite records. You can have a maximum of 100 records in your favorites. For more information about the Favorite Records page, see Favorite Records Page (on page 125).

- Favorite Lists

  The Favorite Lists section provides links to the lists that you have marked as your favorites. This feature allows you to quickly access the lists that you use most often. The Favorite Lists section in the Action Bar can contain up to 10 lists at a time. You can view a complete list of your favorites by clicking the Show Full List link. When you click the Show Full List link, the Favorite Lists page opens, and you can manage your favorite lists. You can have a maximum of 100 lists in your favorites. For more information about the Favorite Lists page, see Favorite Lists Page (on page 143).

  TIP: You can add lists to your favorite lists by clicking the Add to Favorites icon, which is displayed beside the list name on the Manage List page and in the title bar of the list page itself.

- Calendar

  This section contains a calendar with the current date highlighted. When you click a date in the calendar, the Daily Calendar page is displayed for that date. The calendar section does not appear by default, but you can add it to the Action bar in your personal layout. To edit the Action bar in your personal layout, click the My Setup global link, click Personal Layout, and then click Action Bar Layout.

- Custom Web applets

  Your company administrator can create Web applets that can be added to the Action bar to display HTML Web content (for example, polls, videos) and RSS feeds. For more information about custom Web Applets, see About Custom Web Applets (on page 1277).

You can expand or collapse the sections in the Action bar. Your Action bar settings persist when you move through Oracle CRM On Demand. If you hide the Action bar, then the settings for the sections within the Action bar persist even though the Action bar is hidden, and the settings are available if you show the Action bar again.

If your user role has the appropriate privilege, you can change the layout of your Action bar through the My Setup global link. You can display or hide any of the Action bar sections that your company administrator has made available in the Action bar layout for your user role, including Web applets. For more information, see Changing Your Action Bar Layout (on page 758).

Record Type Tabs

Across the top of each page are tabs that open the homepages for the top-level record types that are available to you. For example, if you click the Contacts tab, then the Contacts Homepage opens. The number of tabs that you see depends on the size and resolution of your browser window and on how many tabs are in your tab layout. To learn more about the tab layout, see Displaying Your Tabs (on page 749).

Sections

Each page contains areas called *sections*. These sections group together relevant information for the types of records you're working with.

For example, the Accounts Homepage can show sections for Account Lists, Account Tasks, Recently Modified Accounts, and the Account Analysis Chart.

A section can contain the following types of information:

- **Lists**. Shows records in rows.
- **Forms.** Shows fields for the records in a form.
- **Charts/Graphs.** Shows information in a variety of charts and graphs.

On Detail pages you can expand or collapse the whole form as well as the individual sections in the form. This is useful for avoiding a lot of scrolling and for hiding information in which you are not interested. To collapse a form or section, click the minus icon (-). To expand a section or form, click the plus icon (+). The buttons in each section are visible even when the section is collapsed. The expanded or collapsed state persists across sessions.

List pages and Edit pages do not have this expand and collapse functionality.

Error Messages and On-Screen Help Text

Error messages, when displayed, are indicated by the following icon:

On-screen help text is indicated by the following icon:

Field-Level Tooltip Text

Your administrator can optionally add tooltip text for fields. If tooltip text is available for a field, then the text label for the field is underlined with a dotted line in the record Detail and Edit pages, and in the column headings in List pages and related information sections in the record Detail pages, as shown in the following example:

To see the tooltip text, rest your pointer on the field label. For more information about tooltip text, see Oracle CRM On Demand Page-by-Page Overview (on page 35).

Scrolling Text Bar

A scrolling text bar might appear at the bottom of each page in Oracle CRM On Demand. This text bar is used to display alerts that are created by your administrator. For more information about the scrolling text bar and alerts, see Reviewing Your Alerts (on page 42).

Global Links

On each page in Oracle CRM On Demand, global links at the top of the page allow you to access certain resources and to access your personal profile, where you can personalize your settings, page layouts, and so on. The following table describes the action that occurs when you click each of the standard links. Your company administrator can add custom links on the Oracle CRM On Demand pages and can also hide some of the standard links.

Clicking this link	Does this
Switch to Default Theme or Switch to Tablet Theme	Allows you to switch between your default theme and your tablet theme. For more information, see About Default Themes and Tablet Themes in this topic.
Training and Support	Opens the Training and Support Homepage, which provides access to a range of Training and support resources, including the schedule of free Oracle CRM On Demand Webinars and other training courses. From this page you can create a service request. Make sure you have the following information: - Any error messages displayed in your window - A description of the problem, including the steps you were taking when the error occurred
Admin	Opens the pages where administrators can customize the application. Appears only for those users assigned a role with administrative privileges.
My Setup	Opens the Personal Homepage, where you can update your personal profile and edit the page layout.
Deleted Items	Opens the Deleted Items page, where you can view and restore most deleted items up to 30 days after deletion.
Help	Opens online help at its top topic, displays the table of contents, and shows the Search tab to find information in the help files. From any help window, you can access the PDF version of the help content, allowing you to print a range of topics or the entire help content.
Sign Out	Exits Oracle CRM On Demand.

Additional Links

Each page also contains several links that appear just to the right of the page name. This table describes the action that occurs when you click each of those links:

Clicking this link	Does this
Edit Layout	(Homepages and Detail pages only). If your user role has the appropriate privileges, then the Edit Layout link opens the pages where you can add, rearrange, or hide sections of the page you are viewing. For Detail pages, you can also hide some fields and rearrange the fields on the page. For more information about editing your page layouts, see Changing Your Homepage Layouts (on page 758) and Changing Your Detail Page Layout (on page 749).
Help	Opens an online help topic specific to that page or procedure.

Clicking this link	Does this
Printer Friendly	Opens a separate page, where you can print the data on your page. The Printer Friendly link is available from all pages except the Edit pages.

Oracle CRM On Demand Page-by-Page Overview

Oracle CRM On Demand provides several Web pages for each record type (Accounts, Contacts, and so on).

Homepages

Most Homepages show you tasks related to the types of records that correspond to that page, such as account-related tasks. Generally, they also show filtered lists that have been defined by your company administrator as well as an analytic chart relevant to your work. Homepages can also contain Web widgets, RSS feeds, and other Web content, depending on what your company administrator has set up.

From the Homepage, you can drill down to other pages to manage the various types of information as required.

List Pages

The List pages show the subset of records according to the list you select from the Homepage. From the List pages, you can:

- Sort the records.
- Review multiple records at a glance.
- Find a record to review, delete, or update.
- Update the fields on the List page inline, if the inline edit functionality is enabled.
- Open a record Detail page in the record pane and update the record details without navigating away from the List page, if the record pane is available in the List page.
- Create new records.
- Add the list to your favorite lists by clicking the Add to Favorites icon in the right-hand side of the title bar in the List page.
- Remove the list from your favorite lists by clicking the Remove from Favorites icon in the right-hand side of the title bar in the List page.
- Add a record to your favorite records by clicking the Add to Favorites icon in the row for the record.
- Remove a record from your favorite records by clicking the Remove from Favorites icon in the row for the record.
- Refine the list within the List page, if the Toggle Refine List Pane icon is available. For more information, see Refining Lists Within List Pages (on page 137).
- Change the order of the columns in the list, by dragging the column headings to a new location and dropping them.

In addition, you can use the record-level menu beside each record name to perform various actions on the listed records, including some or all of the following:

- Open the Edit page for the record (by selecting the Edit option), where you can edit all of the fields on the record.
- Create a new record by copying the existing record. Your company administrator determines which field values are automatically copied to the new record.
- Delete a record.

Depending on your company setup and the setup in your user profile, the column headings in List pages might always remain in view when you scroll down a page of records. This feature can be turned on or off at company level, but you can override the company-level Freeze List Column Header setting in your personal profile. For information about changing the Freeze List Column Header setting in your personal profile, see Updating Your Personal Details (on page 734).

NOTE: If tooltip text is available for a field, then the text label for the field is underlined with a dotted line in column headings in List pages.

Manage Lists Pages

The Manage Lists pages show the standard filtered lists and the lists that either you created for your own use, or your manager created for employees to use. From the Manage Lists pages, you can:

- Delete a list.
- Review the entire list of filtered lists.
- Edit a list you or your managers created or begin the process for creating another filtered list.
- Select lists to add to the Favorite Lists section in the Action bar.

Detail Pages

A Detail page shows the information for one record. The top section of the page displays the fields for the record. If inline editing is enabled, then you can update these fields inline. Depending on the setup of your user role, you might be able to personalize the layout of the fields on record Detail pages. For more information, see Changing Your Detail Page Layout (on page 749).

Field Labels and Tooltip Text

Depending on how your administrator sets up the fields, a field that appears on a record Detail page can be labeled with a text label or with an icon that indicates the purpose of the field. For example, a field to hold a cell phone number might be labeled with the text label *Cell Phone Number*, or it might be labeled with an icon that represents a cell phone. Your company can also set up a field so that no label is shown for the field.

Your administrator can optionally add tooltip text for fields. If tooltip text is available for a field, then the text label for the field is underlined with a dotted line in the record Detail and Edit pages, and in the column headings in List pages and related information sections in the record Detail pages, as shown in the following example:

Account Name

Depending on how a field is labeled and on whether tooltip text is available for the field, the tooltip text is shown as follows:

- **Field text labels.** If tooltip text is available for the field, then the tooltip text appears when you rest your pointer on the text label for the field.
- **Field icon labels.** If tooltip text is not available for the field, then the field name appears when you rest your pointer on the icon. If tooltip text is available for the field, then the tooltip text appears when you rest your pointer on the icon.
- **Fields with no label.** No tooltip text is shown.

Images on Detail Pages

For certain record types, your company administrator can specify that an image can be displayed on the record Detail pages. If your administrator specifies that an image can be displayed on a record Detail page, then a placeholder for an image appears at the top left of the Detail page, and you can upload the image that you want to display. You cannot change the location of the image on the page. For more information, see Displaying Images on Record Detail Pages (on page 70).

Related Information Sections

At the bottom of a record Detail page, you can access related information sections that contain lists of records that are linked to the main record. Depending on your setup, the related information sections appear as lists or as tabs. In the standard application, each related information list of linked records on the Detail page shows up to five records of one record type. In the lists of linked records, you can do some or all of the following, depending on the record type and on your access-level settings for the record type:

- Open the full list of related records of a given record type.
- Link additional records to the main record.
- Create new records that are linked to the main record.
- Review already linked records.
- Edit some of the fields on records linked to the main record if inline editing is enabled.
- Change the order of the columns in the list, by dragging the column headings to a new location and dropping them.

If your user role has the Personalize Related Information Display Format privilege, then you can choose to show the related information sections as lists or as tabs, by setting the Related Information Format option in your personal profile. If the Related Information Format field in your personal profile is blank, then the setting for your user role is used; and if the Related Information Format field on your user role is blank, then the setting for the company is used.

If the related information sections appear as tabs, and if the Enable Enhanced View for Tabs check box on the company profile is selected, then additional list functionality, such as sorting, filtering, and searching, is also available in the related information sections. In addition, your administrator can optionally set up a default filter for a list of records in a related information section. For more information about the enhanced view for tabs, see About the Enhanced View for Related Information Tabs (on page 73).

Depending on the setup of your user role, you might be able to personalize the layout of the related information sections on record Detail pages. For more information, see Changing Your Detail Page Layout (on page 749).

For many of the record types that appear in related information sections, your administrator can create layouts that specify which fields are displayed in the list of related records. In the case of some record types, your administrator can also determine which field is used to sort the list of related records when the list is initially displayed, and whether the records are sorted in ascending order or descending order.

Scrolling Through the Related Information Tabs

If you use a classic theme, and if the related information sections appear as tabs, then there might be more tabs available than can fit across the page in your browser window. In that case, you can click the arrows on the right and left of the tabs to scroll through the tabs. The scrolling behavior of the tabs is determined by the Enable Classic Theme Paging for Tabs check box on the company profile, as follows:

- If the Enable Classic Theme Paging for Tabs check box is deselected, then the right and left arrows scroll through the tabs one at a time.
- If the Enable Classic Theme Paging for Tabs check box is selected, then clicking the right and left arrows displays the next or previous set of tabs. For example, if 15 tabs are available to you but only six tabs fit across the page, then you can click the right arrow to display the second set of six tabs, and click it again to display the remaining tabs. You can then click the left arrow to scroll back through the tabs, six tabs at a time.

Record Indicators for Related Information Sections

If your user role has the Personalize Detail Page - Records Indicator privilege, then you can set up record indicators for the related information sections on record Detail pages. The record indicators allow you to see whether any records are present in a related information section, without opening the section. Your administrator can also configure the record indicators for the Detail pages for the record types at role level. If you do not personalize the record indicator settings for a record type, then the settings that are configured for the record type for your role are used.

For information about the behavior of the record indicators, see About the Record Indicators for Related Information Sections (on page 71). For information about personalizing the record indicator settings, see Managing Record Indicators for Related Information Sections (on page 757).

Using the Head-Up Display to View Related Information Sections

The *head-up display* is a list of links to the related information sections of the page. The head-up display might also be available at the bottom of your browser window. For the head-up display to be available, both of the following conditions must be met:

- The Support Head-up Display Settings check box must be selected on your theme.
- The head-up display functionality must be turned on. You can turn the head-up display functionality on or off by setting the Head-up Display option in your personal profile. If the Head-up Display field in your personal profile is blank, then the setting for the company is used.

The following procedure describes how to use the head-up display.

To use the head-up display to view related information sections

- Do one or more of the following:
  - Go to the related information lists or tabs, without having to scroll down the page, by clicking the links in the display.
  - Collapse the head-up display by clicking the minus sign (-) in the display.
  - Expand the display again by clicking the plus sign (+).

  The collapsed or expanded setting in the head-up display is maintained for all record types until you change it again, even if you sign out of Oracle CRM On Demand and sign in again.

NOTE: For information about changing the Related Information Format option and the Head-up Display option in your personal profile, see Updating Your Personal Details (on page 734).

Tasks That You Can Perform on the Detail Pages

On the Detail pages, you can also do the following:

- Create a new record by copying the existing record (for most record types). Your company administrator determines which field values are automatically copied to the new record.
- Expand and collapse the sections in Detail pages as required. These settings are maintained until you change them again, even if you sign out of Oracle CRM On Demand and sign in again.
- Add the record to your favorite records by clicking the Add to Favorites icon in the right-hand side of the title bar in the Detail page
- Remove the record from your favorite records by clicking the Remove from Favorites icon in the right-hand side of the title bar in the Detail page.
- Click the Note icon to add notes or view notes from other users.
- Send a note to another user by moving the pointer over the name of the user, see Sending Notes to Other Users (on page 161).

Detail pages can also contain custom Web applets set up by your company administrator. These are used to embed Web widgets, RSS feeds, and other Web content on the page. For more information, see About Custom Web Applets (on page 1277).

New Record Pages

You can create records from different areas in Oracle CRM On Demand. The field layout that you see on the page where you enter the information for a new record depends on how your user role is set up. For more information about the field layout on new record pages, see About the Layouts of New Record Pages (on page 50).

Edit Pages

The Edit pages show one record's fields in editable format. You can use these pages to update the record information. The record fields on the Edit pages are identical to the top part of the Detail pages. If tooltip text is available for a field, then the text label for the field is underlined with a dotted line in record Edit pages.

Both Edit pages and Detail pages can contain custom Web link fields. For a particular Web link, the administrator can specify whether it appears on the Edit page, Detail page, or both, as described in Setting Up Web Links (on page 1233).

Layout Pages

Administrators and other users who have the necessary privileges can configure and personalize the layout of many pages in Oracle CRM On Demand, as well as configuring tab layouts, Action bar layouts and so on. In the Layout pages where you configure such layouts, you typically specify the configuration that you want by selecting items in one list and moving them to another list.

To move the values from one list to another list in the Layout pages, you can use the left and right arrows that are provided in the page, and the instructions in the online help typically describe this method of moving the values. However, in many Layout pages, you can also move a value from one list to another list by double-clicking the value. When you double-click a value, it is moved to the list immediately to the right of the list in which it previously appeared. If you double-click a value in the rightmost list, then the value is moved to the list immediately to the left of the list in which it previously appeared.

NOTE: In cases where the lists in the Layout page are presented in a grid format, such as the Layout pages for personalizing or customizing field layouts for record Detail pages, the ability to move a value from one list to another list by double-clicking the value is not supported. Also, the ability to move a value from one list to another list by tapping the value on a touch device is not supported.

Typically, up and down arrows are also provided in the Layout pages to allow you to change the order of items within a list of items.

NOTE: The ability to move a value from one list to another is also supported in other areas in the interface. For example, in the Display Columns section in a list setup page, you can move fields from the Available Fields list to the Selected Fields list by double-clicking the field names. Also, in the window where you select values for a multi-select picklist field, you can move the values that you want to the Selected list by double-clicking the values.

About Showing or Hiding the Action Bar

Your company administrator assigns an action bar layout to each user role and can also make the Action bar unavailable to user roles. If the Action bar is available to your user role, then it appears each time that you sign in to Oracle CRM On Demand. During your session in Oracle CRM On Demand, you can hide and show the Action bar as required by clicking the Action bar icon (three horizontal lines).

If you use a classic theme style, then the Action bar icon appears immediately to the left of the tabs on your Oracle CRM On Demand page. If you use a modern theme style, then the Action bar icon appears in the global header on each page in Oracle CRM On Demand.

NOTE: If the Action bar is unavailable to your user role, then you cannot show the Action bar.

My Homepage

From My Homepage, you can review the information for your work day. You can:

- Check your schedule for appointments in the Today's Calendar section.

  NOTE: If the Activity Notification field settings at user level or at company level allow you to receive pop-up reminders, then when you sign in to Oracle CRM On Demand, the Activity Reminder pop-up window displays any reminders that are due for activities that you own or on which you appear in the list of users. If any alert windows appear when you sign in, then you must close the alert windows before you can interact with the Activity Reminder pop-up window. For more information about the Activity Reminder pop-up window, see About Activity Reminders (on page 200).

- Review time-sensitive alerts that inform you of deadlines, such as submitting forecasts, in the Alerts section. Alerts are set up by your company administrator. Your administrator might also set up some alerts so that they appear in a scrolling text bar at the bottom of each page in Oracle CRM On Demand, or in separate pop-up windows when you sign in to Oracle CRM On Demand, or in both of these locations. For more information about the scrolling text bar and pop-up alert windows, see Reviewing Your Alerts (on page 42).
- Scan the list of open tasks, sorted by the due date and priority (up arrow for 1-High, no arrow for 2-Medium, down arrow for 3-Low), in the Open Tasks section.

  NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values (on page 1254).

- Review recently created or recently modified records.

  In the standard application, the Recently Created Leads section displays the leads that were created most recently. You or your company administrator can customize My Homepage to display other types of records.
- View a list of your favorite contacts.

  The Favorite Contacts section shows the names of a maximum of 10 contacts that you added to your favorite records. The order of the contacts in the Favorite Contacts section is determined by the date on which you added the contacts to your favorite records, and not by the date on which the contact records were created. The contacts are listed in descending order by date, with the contact that you most recently added to your favorite records appearing at the top of the list. From the Favorite Contacts section, you can open the full list of your favorite contacts by clicking Show Full List. For information about the Favorite Contacts list, see About the Favorite Contacts List (on page 297).
- Review an analysis relevant to you.

  One or more report sections might be shown on My Homepage, depending on how your company administrator has configured My Homepage. In the standard application, My Homepage shows an analysis of the quality of your opportunities for the current quarter (Pipeline Quality for Current Quarter).
- View Web widgets, RSS feeds, and other Web content.

  Depending on what the company administrator has set up, and what is included in your page layout, you can view embedded Web content on My Homepage. This Web content might include Web widgets, such as Google maps or corporate videos, and RSS feeds. For more information about how external Web content is set up, see About Custom Web Applets (on page 1277).

Your company administrator can customize the layout of My Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

The following table provides instructions for typical tasks you can perform from My Homepage.

To do this	Follow these steps
Alerts	
View a list of alerts	In the Alerts section, click the Show Full List link. The Alerts page opens.
View an alert	In the Alerts section, click the link for the alert. The Alert page opens with additional information about the alert.

To do this	Follow these steps
Appointments	
Create an appointment	In the Today's Calendar section, click New. On the Appointment Edit page, fill in the required information and save the record.
Review an appointment record	In the Today's Calendar section, click the Subject link of the appointment you want to review. The Appointment Detail page appears.
Review this month's appointments	In the Today's Calendar title bar, click the 31 icon. The Calendar opens with the month's schedule.
Review this week's appointments	In the Today's Calendar title bar, click the 7 icon. The Calendar opens with the week's schedule.
Review today's appointments	In the Today's Calendar section, click the View Calendar link, or the 1 icon. The Calendar opens with your appointments for today.
Layout	
Change the layout of My Homepage	To change the information that appears in two sections on My Homepage, click Edit Layout, and click the arrows to add or remove sections, and to organize the sections on the page.
Records **NOTE:** In the standard application, the Recently Created Leads section displays the leads that were created most recently. You or your company administrator can customize My Homepage to display other types of records, for example, Recently Modified Accounts.	
Create a record	In the title bar of the section that displays records, click New. On the Edit page, fill in the required information, and save the record.
Review a record	In the section displaying records, click the link of the record that you want to review. The Record Detail page opens.
Review a list of records	In the section displaying records, click Show Full List. The Record List page opens.
Reports	
Slice the chart by another category	Depending on the analysis that appears, you might be able to click the drop-down list and change the selection. The chart and table show the data categorized by your selection. In the standard application, you can do this with the Pipeline Quality for Current Quarter.

To do this	Follow these steps
View the records comprising a segment in the chart or table	Depending on the analysis that appears, you might be able to drill down on a segment or link to view the records comprising that category. In the standard application, you can do this with the Pipeline Quality for Current Quarter section.
Tasks	
Create a task	In the Open Tasks section, click New. On the Task Edit page, fill in the required information and save the record.
Review a task record	In the Open Tasks section, click the Subject link of the task you want to review. The Task Detail page appears.

Reviewing Your Alerts

Company administrators use alerts to broadcast company information, such as meeting notices and policy changes. Company alerts appear on My Homepage, and depending on how an alert is configured, it might also appear in a scrolling text bar at the bottom of each page in Oracle CRM On Demand, or in a pop-up window when you sign in to Oracle CRM On Demand, or in both of these locations.

Your administrator can optionally configure a company alert so that it is displayed only for users who have a certain role. In general, users can review only the alerts that are displayed for all users, and the alerts that are configured to be displayed for their own role. However, if your role includes the Manage Company privilege, then you can review all alerts, including the alerts that are restricted to certain roles.

If you are a sales representative whose information is included in your company's sales forecasts, you will receive an alert when the forecast has been generated as well.

Your administrator can add files and URLs to an alert as attachments. To access a file or URL that is attached to an alert, and to view the details of the alert, you must access the alert from My Homepage.

To review your alerts on My Homepage

1. Click the Home tab.
2. In the Alerts section, you can:
   - Click the link for the alert you want to review, if it currently appears on My Homepage.

     The Alerts page opens with additional alert information about that alert.
   - Click the Show Full List link.

     The Alerts (List) page opens where you can select an alert, select an option from the drop-down list to limit the types of alert records you see, or create your own filtered list for alerts.

To access a file attached to an alert

1. Open the alert record.
2. In the Attachments section of the alert, click the View link for the file.

   You can choose to open the file, or save it to your local machine.

To access a URL attached to an alert

1. Open the alert record.
2. In the Attachments section of the alert, click the View link for the URL.

   The target URL opens in a new browser tab.

Alerts in Pop-Up Windows and in the Scrolling Text Bar

If an alert pop-up window appears when you sign-in to Oracle CRM On Demand, then it displays the title and description of a single alert. If the scrolling text bar at the bottom of the page is active, then it displays the title of each active alert that is configured to display there for you, unless you have already dismissed the alert.

If you want to prevent an alert from displaying for you in the future, then you can dismiss the alert by selecting the check box labeled “I have read this, never show again”, either in the alert window, or from the scrolling text bar. Dismissing an alert prevents the alert from appearing in a pop-up window when you sign in to Oracle CRM On Demand, and also prevents the alert from appearing in the scrolling text bar. The alert continues to be available to you from My Homepage. Dismissing an alert does not prevent the alert from being displayed for other users.

The scrolling text bar is not active if either of the following is true:

- No active alerts are configured to be displayed there for you.
- You have dismissed all of the active alerts that are configured to be displayed in the scrolling text bar for you.

The content of the scrolling text bar is not refreshed while you are working in a page in Oracle CRM On Demand, unless you refresh the page. The content is automatically refreshed when you navigate to a new page in Oracle CRM On Demand.

In the scrolling text bar, you can do the following:

- View the full description of an alert by hovering your pointer over the alert title.
- Collapse the scrolling text bar by clicking the minus (-) icon.
- Expand the scrolling text bar by clicking the plus (+) icon.
- Dismiss an alert by clicking the alert title, then selecting the check box labeled “I have read this, never show again”, and then clicking OK.

If the scrolling text bar is expanded, then the expanded state persists when you navigate away from the current page or refresh the current page. If the scrolling text bar is collapsed, then when you navigate away from the current page or refresh the current page, the scrolling text bar is automatically expanded if either of the following is true:

- There is a new alert to be displayed for you in the scrolling text bar.
- An alert that you have not dismissed and that is configured to be displayed in the scrolling text bar for you has been updated.

Otherwise, the collapsed state persists.

Each time you sign in to Oracle CRM On Demand, the scrolling text bar is expanded if there is content to be displayed there for you.

Related Topics

See the following topics for related information:

- Alert Fields (on page 1185)
- Working with Lists (on page 125)

Working with the Message Center

The Message Center in the Action bar allows you to manage notes for yourself, notes from other users, and notes about records, all in one place. The Message Center therefore promotes more effective communication and collaboration within Oracle CRM On Demand.

The Message Center can contain:

- **Notes that you create for yourself.** You can create notes for yourself in the Message Center. This is useful for recording actions that you want to follow up on, or for information that you want to refer to later. These private notes are indicated by an icon showing a key.
- **Notes on records to which you subscribe.** On record types that support the notes feature, you can keep track of conversations about a particular record, by navigating to the Detail page and subscribing to any new notes added on the record. You will then get a copy of all such notes in the Message Center, and you can reply to the record from the Message Center. You only get a copy of new notes added to the record; you do not get notes about other changes to the record.
- **Notes sent to you by other users.** Another user can click on the note icon next to your name in a page in the application and send a note to you. Notes sent to you in this way are indicated by an icon showing two people.

The Message Center contains a note (pushpin) icon and the number of new messages is displayed next to the note icon.

When you click the note icon in the Message Center, the list of notes is displayed. For each note, the name of the user who created the note is displayed, together with the subject or first part of the note text, if there is no subject. The date of the note is displayed, or if the note is from today, the time.

From the list of notes you can do the following:

To do this	Follow these steps
View a note	Scroll down to the required note. If the note is linked to a record to which you are subscribed, you can drill down on the record from the link in the note.
Create a new note	Click New Note. Type a subject on the first line if required, type the note, and click Save. The subject is optional; if you do not provide a subject, the first few characters from the text of the note are copied to the subject line.
Reply to a note	Scroll down to the required note, click Reply, and type your note. When you click Save, your reply is sent to the Message Center of the user who sent you the note. If you select Post, your reply is posted to the relevant Detail page, and is sent to all users subscribed to the record.
Delete a note	Scroll down to the required note, and click Delete. This action deletes the copy of the note from your Message Center, but does not delete the actual note on the record Detail page.
View details of the user who sent a note	Scroll down to the required note, and click the user name. The User Details page for the user is displayed.

You can embed the Message Center as a Web widget in other applications. For more information, see Embedding a Message Center Widget (on page 767).

When the Message Center is embedded as a Web widget, you can click the Refresh button to update the Message Center with the latest messages from Oracle CRM On Demand.

Working with Embedded Analyses and Dashboards

Your administrator can embed analyses and dashboards in a number of places in Oracle CRM On Demand. For example, an analysis might appear in a custom Web applet on a record-type Detail page. As another example, a dashboard might appear in a custom Web tab.

Depending on the settings that your administrator selects for an embedded analysis, links might be available to allow you to perform some or all the following actions for the analysis:

- Refresh the data in the analysis.
- Print the analysis.
- Export (download) the analysis.

In addition, your administrator determines whether you can use any prompts that are configured for the analysis. Prompts allow you to specify filter values for the analysis.

When you view an embedded dashboard, you can perform the following actions:

- Refresh the data in all of the analyses in the dashboard.
- Customize the dashboard pages and subpages, and save your customizations. For information about customizing dashboard pages, see Customizing Dashboard Pages at Runtime (on page 1089).

You can access the refresh and customization features through the Page Options icon in the top-right corner of the embedded dashboard.

Depending on the print and export options that are specified for the dashboard, you might also be able to perform some or all of the following actions:

- Print a page or subpage.
- Export the dashboard, a page, or a subpage.

You can access the print and export options through the Page Options icon in the top-right corner of the embedded dashboard.

NOTE: The specific options that are enabled for printing and exporting, such as the Printable PDF and Export Current Page options, are available in the submenus for the Print and Export to Excel options in the Page Options menu. If none of the print options are enabled, then the submenu for the Print option is empty and you cannot print a page or subpage. Similarly, if none of the export options are enabled, then the submenu for the Export to Excel option is empty, and you cannot export any part of the dashboard.

Working with RSS Feed Applets

In Oracle CRM On Demand, you can use RSS feed applets to subscribe to frequently updated content in which you are interested, such as blog entries, news headlines, or podcasts. This content can, for example, supplement your CRM information with information from news providers to which you have subscribed. You might have general market news displayed in your homepage. You might have news and information that is specific to your client's employers in the Contacts detail page.

Oracle CRM On Demand has a feed reader built into the application, which aggregates content so that you never have to leave the application. For example, rather than having to visit other Web sites for market news, the information is delivered within Oracle CRM On Demand. In addition to aggregating content, the feed reader can accept user and record field parameters.

RSS feed applets are a type of custom Web applet, created by the company administrator, in which the URL for an RSS feed is specified. RSS feed applets can therefore appear in the following places:

- My HomePage
- Record type homepages

- Record type Detail pages
- The Action bar

For more information about custom Web applets, see About Custom Web Applets (on page 1277).

You must add the applet to the homepage layout, detail page layout, or Action bar layout, if it does not already appear on the page or Action bar.

Your company administrator can specify that an RSS feed applet is configurable. If this is the case, a Configure link is displayed with the applet, and you can change the name of the applet and the URL associated with the applet so that a different RSS feed is displayed. If an RSS feed applet is not configurable, the Configure link is not displayed.

NOTE: Your company administrator will only make a few RSS feed applets configurable.

If the company administrator deletes an RSS feed applet, the customized versions of the applet are also deleted from the application. For example, if a user has an applet for a CNN news feed on his homepage, and another user has configured the applet for an NBC news feed on her homepage, both users lose access to the applet feed if the original RSS feed applet is deleted.

To configure an RSS feed applet

1. Click the Configure link.
2. In the Name field, type an appropriate name for the applet.
3. In the URL field, edit the URL as required.
4. Click Save.

   The feed is refreshed with data from the configured URL. For more information on the standardization of URLs in Oracle CRM On Demand, see About URL Standardization (on page 1324).

   Note: You can click Use Default to return to the URL as defined by the company administrator.

Working with Records

This topic describes the following common procedures for working with records:

Related Topics

See the following topics for related information:

- Import and Export Tools (on page 1610)
- About Data Access, Record Sharing, and Record Ownership (on page 47)

About Data Access, Record Sharing, and Record Ownership

Your access to data in Oracle CRM On Demand is determined by certain access-control components that are associated with your user role in Oracle CRM On Demand, as follows:

- **Privileges.** You can access certain business data or administrative data if your user role is granted the privilege for that data. For example, if your user role has the Manage Data Rules - Manage Workflow Rules privilege, you can access all of the workflow configuration data.
- **Record-type access and access profiles.** To access records of a given record type, your user role and your access profiles must have the appropriate settings, as follows:
  - For top-level record types, access to the record type must be granted to your user role. For example, to access any account record, your user role must be granted access to the Account record type.
  - Your access profile must allow you to access the record type. Access profiles also control which operations you can perform on the data that you can access. For example, your owner access profile could grant you editing rights to account records that you own, and your default access profile could grant you read-only rights to account records that you view through shared access but do not own.

    NOTE: Access profiles are also used in various record-sharing mechanisms, which are explained in the next section.

Record-Sharing Mechanisms

Users can share records through the following record-sharing mechanisms:

- **The company's reporting hierarchy.** For example, a manager can see a subordinate's records.
- **User delegation.** For example, a user can delegate access to another user who might not be in the same reporting hierarchy.
- **Custom book membership.** For example, a diverse group of users can be granted access to a set of records associated with a custom book called *Hot Deals*.
- **Team membership**. For example, the owner of an account record can share the account with a set of users at his discretion.
- **Group membership.** A *group* is a predefined team of users. For example, if a user who is a member of a group becomes the owner of a contact record, all other members of the same group are also added to the contact team. For more information about groups, see Group Management (on page 1458).

NOTE: Sharing data through custom books is the most efficient method of sharing data for large companies where users share more than one million records.

Record Ownership Modes

For most of the record types that support custom books, your company administrator can set up record ownership for the record type in user mode, book mode, or mixed mode. Depending on your company's policies and on the ownership modes that are configured for the record types, you can own records directly, access records through record-sharing mechanisms, or a combination of both. The record ownership modes are as follows:

- **User mode.** When a record type is configured in user mode, each record of that record type must have an owner assigned to it. A user owns a record when the user is associated with the Owner field of the record. If the Book field is available on the detail page of the record, then the Book field displays the user book associated with the owner.
- **Book mode.** When a record type is configured in book mode, records of that record type do not have owners assigned to them. Instead, each record must have a primary custom book associated with it. Associating a

primary custom book with a record does not mean that the custom book owns the record, because a custom book is a record-sharing mechanism. Associating a primary custom book with a record indicates only that the record primarily belongs to a custom book and does not belong to any particular user. The book mode is useful in reports where you want to indicate that a record belongs to a certain custom book so that it is not counted multiple times if the record is also shared with other books.

- **Mixed mode.** When a record type is configured in mixed mode, a record of that record type can be set up in any one of the following ways:
  - The record can be set up without either an owner or an associated primary custom book.
  - The record can have an owner assigned to it.
  - The record can have a primary custom book associated with it.

For record types that do not support custom books but require an owner, only the user mode of record ownership is supported.

In any record ownership mode, a record cannot have both an assigned owner and an associated primary custom book. However, in any of the ownership modes, you can assign additional custom books to a record, if the record type supports custom books.

If the Book field is present on a record Detail page, then the field can show the name of a user book or a primary custom book for the record, or the field might be blank, as follows:

- If the record is owned by a user, then the Book field shows the name of the user book for the record owner.
- If the record is not owned by a user, then the Book field might show a primary custom book for the record, or the field might be blank.

Your company administrator configures the record ownership mode by making certain fields required for the record type. Your company administrator can change the record ownership mode for a record type. For information about configuring record ownership modes, see Configuring Record Ownership Modes (on page 1446).

Default Values in Owner and Book Fields

When you open a New record page, the values in the Owner and Book fields are as follows:

- If the record type is configured in user mode, then the Owner field is automatically populated with your alias. The Book field, if it is present, is automatically populated with the name of your user book.
- If the record type is configured in mixed mode, then neither the Owner field nor the Book field is populated.

  NOTE: Appointments that you create through your calendar are an exception to the normal behavior for record ownership modes. When you create an appointment through your calendar, the Owner field is populated with your name, regardless of the record ownership mode.

- If the record type is configured in book mode, then the following happens:
  - The Owner field on the new record is not populated.
  - For the Book field, the default value depends on the default book that is specified for the record type on your user record, as follows:
    - If a custom book is specified as the default book for the record type, then the Book field on the new record is automatically populated with the name of the specified default book.
    - If a default book is not specified for the record type, or if a user book or the All book is specified as the default book for the record type, then the Book field is not populated on the new record. For information about the All book, see Using the Book Selector (on page 106).

NOTE: Either the Owner field or the Book field can be a required field on a page layout, even if the record type is configured in mixed mode. If the Owner field is required, then the Owner field is blank by default when you open a New record page, but you must select an owner for the record before you save the record. When you select an owner for the record, the Book field shows the name of the user book for the owner. If the Book field is required on the page layout, then you must select a primary custom book before you save the record.

What Happens When the Record Ownership Mode for a Record Type Changes?

When the record ownership mode for a record type changes from one mode to another mode, then the following happens:

- When you create a new record of that record type, you might be required to select an owner for the record or to associate a primary book with the new record, depending on the new ownership mode.
- If you are the first user to update a record after the ownership mode changes, then you might be required to select an owner or a primary book for the record before you can save your changes, depending on the new ownership mode. The following table shows the behavior in each circumstance.

Old Mode	New Mode	Behavior
User mode	Book mode	You are required to select a primary custom book in the Book field.
User mode	Mixed mode	You can select an owner in the Owner field or a primary custom book in the Book field, but you cannot select both.
Book mode	User mode	You are required to select a user in the Owner field.
Book mode	Mixed mode	You can select an owner in the Owner field or a primary custom book in the Book field, but you cannot select both.
Mixed mode	User mode	You are required to select a user in the Owner field.
Mixed mode	Book mode	You are required to select a primary custom book in the Book field.

In addition, if the owner of an existing record is removed from the record when the record is updated after the record ownership mode for the record type changes from user mode to another mode, then the following happens:

- If the record type supports teams, then all of the members of the team, except the former owner of the record, remain as members of the team. The behavior is the same for team members who are members of a predefined group; that is, all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a predefined group, then all of the members of the group are removed from the team. Any team members who are not members of the predefined group remain as members of the team, as is the case with other record types.

  NOTE: In the standard application, the former owner of the record is not retained as a member of the team, as described here. However, your administrator can configure the record type so that the former owner of the record is retained as a member of the team on the record. For information about configuring a record type to retain the former owner as a member of the team, see Customizing Previous Ownership for Shared Records (see Customizing Previous Ownership for Shared Records on page 1355).

- If an activity that previously had an owner is updated and the owner field is cleared, then the activity no longer appears in the calendar of the former owner. However, the activity appears in the lists of related activities that users access from record Detail pages. Any user, including the former owner of the record, who has access to the record through book membership sees the activity in the related list of open or completed activities as appropriate.

About the Layouts of New Record Pages

In the standard application, the field layout on the page where you enter the information for a new record is the same as the field layout on the Detail page for the record type. However, you might see a different layout, depending on how your user role is set up. The layout that you see when you create a record is determined by the following features:

- **Custom layouts for new record pages.** Your administrator can create a custom layout that is used specifically for the page where you enter the information for a new record of a given record type, and then assign that layout to your role, or assign the layout to a related information section in a custom page layout for a parent record, so that the layout is used when you create records from that related information section. Typically, a custom layout for a new record page contains fewer fields than the Detail page layout for the record type.

  For example, you might see one layout for the new lead record page when you create a lead from the Leads Homepage, a different layout when you create a lead from the list of related leads on the Account Detail page, and a third layout when you create a lead from the list of related leads on the Contact Detail page.

  In addition, your administrator can specify that a custom layout for a new record page is used when you create a record through the Action bar (or through the global header, if you use a modern theme), but is not used when you create records from other locations. If your administrator selects this option on your role, then the following happens:

  - The custom layout for the new record page that is assigned to your user role for the record type is used in the new record page when you create a record through the Action bar.
  - The field layout of the Detail page that is assigned to your user role for the record type is used in the new record page when you create a record from other areas in Oracle CRM On Demand, such as when you open the new record page by clicking the New button on a Homepage, List page, or Detail page. The field layout of the Detail page for the record type is also used in the new record page when you create a record of that record type from a list of related records, unless your administrator assigns a different custom layout for that purpose.

  NOTE: When a custom layout is used for the new record page, an Advanced link is available on the page to allow you to switch to the full layout of the new record page.

- **Personalized layouts.** If your user role allows you to personalize the field layout on record Detail pages, and if you personalize the field layout for the Detail page for a record type, then your personalized field layout is also used in the page where you enter information for a new record, unless a custom layout is assigned to your role for the new record page, or a custom layout is assigned for creating records from a list of related records. If a custom layout is assigned to your user role for the new record page, or a custom layout is assigned for creating records from a list of related records, then the relevant custom layout is used instead of your personalized layout. An Advanced link is available on the page to allow you to switch to your personalized layout for the page. For information about personalizing your page layouts, see Changing Your Detail Page Layout (on page 749).

  NOTE: You cannot personalize the field layout of a custom layout for a new record page.

Creating Records

You can create a record from different areas within the application. The area you choose depends on whether you want to:

- Create the record in a popup window that is independent of the records you are working on. You will not lose your place in the main area of the application.
- Create the record from clicking the New button on the Homepage, List, or Detail page. Each of these pages opens the same form as the other methods, but it shifts the focus from your current page to the Edit page. You will need to use the Back link to return to the page you were working on.
- Create the record for a different record type that is automatically linked to the record you are currently working on.

You can also create new records in the following ways:

- By importing records:
  - Using the Import Assistant to import records from external, comma-separated value (CSV) files if your user role has the Personal Import privilege
  - Using the Oracle Data Loader On Demand client utility
  - Using Web services to synchronize records with other applications

  The type of records you can import depends on the privileges assigned to your user role. For more information on how to import records from external CSV files and other external sources, see Import and Export Tools (on page 1610).
- By converting lead records. Based on the options that you select on the Convert Lead page, you can create one or more of the following by converting a lead record:
  - An account record
  - A contact record
  - An opportunity record

  For more information about converting leads, see Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 252).
- By converting deal registration records. Based on the options that you select on the Convert Deal Registration page, you can create one or more of the following by converting a deal registration record:
  - An account record
  - A contact record
  - An opportunity record

  For more information about converting deal registrations, see Converting Deal Registrations to Accounts, Contacts, or Opportunities (on page 446)

TIP: To prevent record duplication, search for the record before creating a new one, see Finding Records (on page 74).

NOTE: An asterisk (*) beside a field name indicates that this is a required field. Also, if a custom layout is assigned to your role for the new record page for the record type, then the page that opens when you create a record might include fewer fields than are available in the full page layout for the record type. If you want to enter information for additional fields, then you can open the full page by clicking the Advanced link in the new record page. The Advanced link is available in the new record page only if a custom layout is assigned to your role for the new record page for the record type. For more information about the field layout on new record pages, see About the Layouts of New Record Pages (on page 50).

To create a record using the Create section

1. In the Action bar, expand the Create section if necessary.
2. Click the record type that you want to create.

3 In the New record form, fill in the record information.

4 Save the record, by clicking either Save or Save and Continue:

- If you click Save, then Oracle CRM On Demand saves the new record and closes the new record form.
- If you click Save and Continue, then Oracle CRM On Demand saves the new record and navigates you to the new record's Detail page so that you can associate additional content to the record, for example, notes and attachments.

To create a record from the Homepage, List, or Detail page

1. From any of these pages, click the New button in the title bar.
2. On the Edit page, fill in the record information.
3. Save the record.

To create a record that is linked to the selected record

1. Select the record.

   For instructions on selecting a record, see Finding Records (on page 74).
2. On the record Detail page, scroll to the appropriate section.
3. On the title bar for that section, click the New or Add button.
4. On the Edit page, fill in the record information.
5. Save the record.

Entering Information in Records

When you create records you can enter information directly into some fields, or select values from a drop-down list. In addition, for some fields you can click an icon to the right of the field to display a window from which you can select values or enter values. The icons that you can click are:

- **Phone icon**. Allows you to enter the details of a telephone number.
- **Calendar icon**. Allows you to select a date.
- **Currency icon**. Allows you to search for, and select a currency.
- **Lookup icon (magnifying glass)**. Allows you to search for, and select a record, or multiple records, which will be associated with the record you are creating. The Lookup icon is also used for selecting values for multi-select picklist fields.

About Picklist Fields and Picklist Value Groups

In picklist fields, you can select a value from a predefined list of values. If your company uses picklist value groups, then your company can limit the values that are available in a picklist field to a subset of the values that are defined for the field in certain cases. For more information about picklist fields and picklist value groups, see About Picklist Fields, Picklist Value Groups, and Divisions (on page 58).

About Multi-select Picklists

A multi-select picklist is a picklist from which you can select multiple values. When you click the Lookup icon for a multi-select picklist, a pop-up window appears, which allows you to select the required values by moving values from an Available list to a Selected list. You can move a value from one list to the other by double-clicking the value, or by selecting the value and using the left and right arrows to move it. You can also sort the values in the Selected list.

Multi-select picklists are supported for the following record types:

- Account
- Activity
- Contact

- Custom Object 01
- Custom Object 02
- Lead
- Opportunity
- Partner
- Service Request

About Phone Number Fields

Phone fields have a phone icon next to them. Clicking the icon opens the phone editor, where you can do the following:

- Select the country of the phone number.
- Enter the city or area code.
- Enter the local number.
- Enter an extension number if one exists.

When you save the phone number, Oracle CRM On Demand prefixes the phone number that you entered with both of the following:

- A plus symbol (+) to represent the international access code for dialing out of the country where you are located.

  For example, if the Locale setting on your user record is English - United States, the plus symbol represents the 011 international access code. If the Locale setting on your user record is French - France, the plus symbol represents the 00 international access code.
- The country calling code for the country that you selected for the phone number.

  For example, if you select Spain as the country for the phone number, Oracle CRM On Demand prefixes the phone number with 34, in addition to the plus symbol.

TIP: If you want to determine the country calling code for a country, you can click the phone icon, select the country, and save the information. The country code for the country is displayed in the Phone field.

The list of countries in the phone editor includes some dependencies, foreign territories, and regions of sovereign states. For example, the Isle of Man is a British crown dependency, and Aland Islands is a region of Finland. A dependency, foreign territory, or region can have the same country code as its sovereign state. In such cases, when you edit a phone number with that country code, the Country field in the phone editor shows the name of the sovereign state, even if the dependency, foreign territory, or region of the sovereign state was chosen when the number was originally entered.

For example, you might select Aland Islands in the Country field in the phone editor when you first enter a phone number. Oracle CRM On Demand automatically prefixes that phone number with 358, in addition to the plus symbol. If you click the phone icon later to edit the phone number, then Finland appears in the Country field in the phone editor.

About Conditionally Required Fields

Your administrator can configure a field so that it is conditionally required, that is, the field is not required by default, but becomes required if the data in other fields on the record meets certain criteria. When this happens, a red asterisk (*) displays beside the field that is now a required field, and if the text label is displayed for the field, it is displayed in red text. If the field is blank, then you must update it before you save the record.

For information about some limitations that apply when editing conditionally required fields, see About Conditionally Required Fields (on page 1217).

About the Automatic Conversion of Text to Links

If the text string that you enter in a field of the Text (Short) or Text (Long) field type starts with http:// or https://, then the text might be automatically converted to a link after the field value is saved. The Convert URL Text Values to Links check box on the company profile determines the behavior of such text in these fields, as follows:

- If the check box on the company profile is selected, then the text is automatically converted to a link after the field value is saved.
- If the check box is not selected, then the text is not converted to a link.

About Address Fields

For addresses, the application displays different fields to accommodate country-specific information. For example, if you select Japan as the Country for an account's billing address, the other address fields change to those fields needed for Japanese addresses, such as Chome, Ku, and Shi/Gun.

In general, addresses are stored with the specific record type. However, some addresses are carried over when you link one record with another. For example, if you enter a billing and shipping address for an account, the billing address appears on the Contact Detail page when you link the account to the contact.

If your company administrator has added the Addresses section to your application, you can track additional addresses for such records as accounts and contacts. When tracking addresses for contacts, the primary address is always the one you entered in the Alternate address section.

Support for HTML Formatting

Depending on your company setup, HTML formatting might be supported in certain fields, including the Description field on many record types. For more information, see About the HTML Editor (on page 62).

Related Topics

See the following topics for related information:

- About Concatenated Fields (on page 54)
- About Fields Displayed as Images (on page 56)
- About Picklist Fields, Picklist Value Groups, and Divisions (on page 58)
- About Maskable Fields (on page 60)
- About Special Characters in Email Addresses (on page 61)
- About the Layouts of New Record Pages (on page 50)

About Concatenated Fields

A *concatenated field* is a field that can display the values from multiple fields and can also display additional text. Your administrator can set up concatenated fields for most record types. For example, your administrator might set up a concatenated field called Profile on the Contact record type to show the value of the Job Title field and the Age field in the following format:

Job Title, aged *Age*

Your administrator can then add the field to the Detail page layout for the Contact record type. If a contact's job title is Manager and the contact is aged 41, then the Profile concatenated field for the contact shows the following:

Manager, aged 41

If you have the necessary permission to edit the fields that appear within a concatenated field, then you can edit the fields through the concatenated field. In the example described earlier, you can change the job title of the contact by editing the concatenated field, but you cannot change the age of the contact. The age of the contact is calculated from the date of birth on the contact's record, and the Age field is not an editable field.

Your administrator can also include expressions in the configuration of a concatenated fields. These expressions might determine the behavior of the fields and text within the concatenated field. For example, a concatenated field might be set up with an expression that results in certain text within the concatenated field being changed or removed if you change the value in another field on the record. As another example, a concatenated field might be set up with an expression that results in a default value being displayed in a field within the concatenated field, if the same field on the record is blank.

The concatenated fields can appear on record Detail pages and Edit pages, on List pages, and in related information sections. However, you cannot use the concatenated fields as search fields or as filter fields for lists. Depending on how your user role is set up, you might be able to use the fields within the concatenated fields as search fields and as filter fields for lists.

Related Topics

See the following topics for related information:

- Considerations When Editing Fields in a Concatenated Field (on page 55)
- Editing Fields in a Concatenated Field (on page 56)
- About Targeted Search (on page 75)
- Using Advanced Search (on page 92)
- Creating and Refining Lists (on page 130)

Considerations When Editing Fields in a Concatenated Field

The following considerations apply when you edit the fields within a concatenated field:

- If your administrator specifies a field as read-only for the record type or in the Detail page layout, then you cannot edit that field within a concatenated field.
- If your administrator specifies that a field is required, then that field must have a value when it is part of a concatenated field.
- Any field validation rules that apply to a field continue to apply to the field when it is part of a concatenated field.
- If your update to a field within a concatenated field fails the validation rules for the field, then none of your changes to the fields are saved. In other words, either all of your changes in the edit window are saved or none of them are saved.
- When you edit a concatenated field on a record Edit page, your changes are not saved when you click Save to close the edit window for the concatenated field. Your changes to the fields within the concatenated field are saved when you save the record.
- If a concatenated field includes a field that allows you to associate a record with the record you are working with, and if smart associations are enabled, then the smart association functionality is supported within the concatenated field. For information about smart associations, see About Smart Associations and the Auto-Resolve Functionality (on page 106).
- You cannot edit any of the additional text that your administrator specifies within a concatenated field.

About Address Fields in Concatenated Fields

Your administrator can include fields from addresses in a concatenated field. When you edit a concatenated field that includes a field from an address, the following considerations apply:

- If an address field in a concatenated field is from a shared address on an account, contact, dealer, or partner record, then you cannot edit the fields within the address. Instead, you can select a different address.
- If the field is from an address that is not a shared address, then the following considerations apply:
  - You can edit all of the fields within the address.

    For example, if the Billing City field is included in a concatenated field, then you can edit all of the fields within the billing address template for the relevant country. If the concatenated field also includes a field from another address, such as the Shipping City field from the shipping address, then you can also edit all of the fields within the template for that address for the relevant country.

- If you select a different country for the address, then the labels of the other fields within the address template change accordingly.

NOTE: If the concatenated field includes an address field that is not part of the address template for the country in the address on the record, then the field is blank within the concatenated field. In this case, when you edit the concatenated field, you can edit the fields that make up the address template for the address on the record. However, you cannot edit the field that is part of the concatenated field unless you change the country in the address and the address template for the new country includes the field.

Related Topics

See the following topics for related information:

- About Concatenated Fields (on page 54)
- Editing Fields in a Concatenated Field (on page 56)

Editing Fields in a Concatenated Field

This topic describes how to edit the fields in a concatenated field.

To edit the fields in a concatenated field using the inline edit functionality

1. Click the concatenated field to open the edit window.
2. In the edit window, edit the individual fields that appear in the concatenated field.
3. Save your changes.

Editing the Fields in a Concatenated Field in a Record Edit Page

The following procedure describes how to edit the fields in a concatenated field in a record Edit page.

To edit the fields in a concatenated field in a record Edit page

1. Click the edit icon (pencil) for the concatenated field to open the edit window.
2. In the edit window, edit the individual fields that appear in the concatenated field.
3. Save your changes.
4. When you finish editing the record, save your changes.

NOTE: When you edit a concatenated field on a record Edit page, your changes are not saved when you click Save to close the edit window for the concatenated field. Your changes to the fields within the concatenated field are saved when you save the record.

Related Topics

See the following topics for related information:

- Considerations When Editing Fields in a Concatenated Field (on page 55)
- About Concatenated Fields (on page 54)

About Fields Displayed as Images

In the following types of fields, the field value is displayed as an image and stored as an integer:

- **Star-rating integer fields.** In a star-rating integer field, the field value is displayed as an image of five stars. Your company can use the star-rating fields in various ways to meet its business needs. For example, your company might use a star-rating field on opportunity records to indicate the estimated value of the opportunities. In a star-rating field, you select the stars to increase the rating and deselect the stars to reduce the rating. If no star is selected, then no rating applies. One selected star is the lowest rating, and five selected stars are the highest rating.

The field value is stored as an integer, as follows:

- When no star is selected, then the field is null, that is, it has no stored value.
- When one star is selected, the stored value is 1. When two stars are selected, the stored value is 2, and so on.

TIP: If a star rating is set and you want to clear the star rating so that the field has a null value, then edit the field and click immediately to the left of the first star in the rating field to clear the rating.

- **Stoplight integer fields.** In a stoplight integer field, the field value is displayed as a horizontal stoplight. When you select the first light it is red, when you select the second light it is amber, and when you select the third light it is green. Your company can use the stoplight fields in various ways to meet its business needs. For example, your company might use a stoplight field on task records to indicate how close the due date for the task is, as follows:
  - A green status might indicate that the due date is five days or more from today.
  - An amber status might indicate that the due date is fewer than five days from today.
  - A red status might indicate that the due date is in the past, that is, the task is overdue.

At most, only one of the lights in a stoplight field can be selected at any time, and the field can have no light selected.

The field value is stored as an integer, as follows:

- If no light is selected, then the field is null, that is, it has no stored value.
- When the red light is selected, the stored value is zero (0).
- When the amber light is selected, the stored value is 1.
- When the green light is selected, the stored value is 2.

TIP: If a light is selected and you want to reset the field so that no light is selected and the field has a null value, then edit the field and click the light that is currently selected. The light is then deselected, and the field has a null value.

About Star Rating and Stoplight Fields in Search and List Criteria

You can use star rating and stoplight fields as filter fields for lists, and your administrator can also add these fields to the search layout for the record type. However, to specify the value that you want to search for, you must enter the integer value of the field. For example, if you want to find records that are not rated, then use the Is NULL condition in the rating field to search for the records. If you want to find records that have a green setting in a stoplight field, then search for records where the value in the stoplight field is equal to 2.

About Editing Star Rating and Stoplight Fields

You can edit star rating and stoplight fields in record Edit pages, and you can also edit them inline in record Detail pages and List pages. If a star-rating field is included in the displayed columns in a list, then the star image appears in the field for a record if at least one star is selected in the field in that record. However, if no stars are selected in the field, then the image does not appear in the field in the list, but you can update the field inline on the List page to select stars.

Similarly, if a stoplight field is included in the displayed columns in a list, then the stoplight image appears in the field for a record if a light is selected in the field in that record. However, if no light is selected in the field, then the image does not appear in the field in the list, but you can update the field inline on the List page to select a light.

Record Types That Support Star Rating and Stoplight Fields

The following record types support star rating and stoplight fields:

- Account
- Activity
- Contact
- Lead

- Opportunity
- Solution

NOTE: The star-rating and stoplight fields are supported by the various application programming languages (API) that can be used with Oracle CRM On Demand.

About Picklist Fields, Picklist Value Groups, and Divisions

For many record types, your company can limit the values that are available in a picklist field to a subset of the values that are defined for the field. To limit the selections in picklist fields, your administrator sets up picklist value groups and links the values in the picklist fields to the picklist value groups. Picklist value groups can control one or more picklist fields on one or more record types. Your administrator can add the Picklist Value Group field to the page layout for a record type. This field allows you to select a picklist value group. Then, in any picklist field that is controlled by the picklist value group that is selected on the record, only the values that are linked to the picklist value group appear in the picklist.

For example, assume that your company has three call centers that use Oracle CRM On Demand. Depending on the location of a call center and the products that the call center services, some of the values in a number of picklist fields in service requests are not valid selections for users in the various call centers. To help users to select values that are appropriate for their call center, your administrator sets up three picklist value groups; that is, one picklist value group for each call center. The administrator then links a subset of the values for each of the relevant picklist fields to each of the picklist value groups, and adds the Picklist Value Group field to the page layout for the Service Request record type. When a user in a call center creates a service request, the user can select the appropriate picklist value group for that call center in the Picklist Value Group field on the service request. Then, the choices in the picklist fields on the record are limited to the values that are appropriate for the call center.

About Picklist Value Groups and Divisions

If your company uses the Division record type to organize users into subgroups for business purposes, then your user record might be associated with one or more divisions, one of which is specified as your primary division. Each division can be associated with a picklist value group. In such a setup, when you create a record, the record is automatically associated with your primary division and with the picklist value group that is associated with the division. For a list of the record types in which divisions and picklist value groups can be used, see Record Types That Support Picklist Value Groups and Divisions (on page 1331).

NOTE: Your administrator can configure divisions and picklist value groups to meet the business needs of your company. Your administrator can also rename the Division record type and can rename the Division field and the Picklist Value Group field on any record type where the fields are available.

Picklist Value Groups and Divisions Setup

If your company uses picklist value groups, then the following setup applies:

- Your administrator sets up the picklist value groups.
- Your administrator links the picklist values for various fields to the picklist value groups.
- Your administrator adds the Picklist Value Group field to the page layouts that are assigned to your user role for certain record types.

If your company also uses the Division record type, then the following setup also applies:

- Your administrator specifies which users are associated with each division.
- Your administrator specifies which picklist value group, if any, is associated with each division.
- Your administrator can add the Division field to the page layouts that are assigned to your user role for certain record types.

Behavior of the Division and Picklist Value Group Fields When Creating and Editing Records

If your company uses picklist value groups and divisions, then the behavior that you see when creating and editing records is as follows:

- If your user record is associated with one or more divisions, then when you create a record, the following happens:
  - The Division field on the record is automatically populated with the name of your primary division.
  - If a picklist value group is associated with your primary division, then the Picklist Value Group field is automatically populated with the picklist value group for that division. If no picklist value group is associated with your primary division, then the Picklist Value Group field is not automatically populated.
- You can change or clear the value of the Division field on a new record of that type before you save the new record. You can also change or clear the value of the Division field on an existing record, provided that you have the necessary access rights to update the record. After you change the value of the Division field, the value of the Picklist Value Group field on the record might also change automatically, as follows:
  - If the picklist value group for the new division is the same as the picklist value group that is assigned to the former division, then the value in the Picklist Value Group field does not change.
  - If the picklist value group for the new division is different from the picklist value group that is assigned to the former division, then the value in the Picklist Value Group field changes to the picklist value group for the new division.
  - If you clear the value from the Division field, then the value in the Picklist Value Group field is automatically cleared.

  NOTE: Your administrator can set up the Division field as a read-only field, in which case you cannot change or clear the value in the field.

- You can change or clear the value of the Picklist Value Group field on a new record of that type before you save the new record. You can also change or clear the value of the Picklist Value Group field on an existing record, provided that you have the necessary access rights to update the record. The division on the record is not automatically changed when you change or clear the Picklist Value Group field.

  NOTE: Your administrator can set up the Picklist Value Group field as a read-only field. In that case, you cannot change or clear the value in the field.

If the owner of a record changes after a value is saved in the Division field on the record, then the values in the Division field and Picklist Value Group fields are not automatically changed even if the new owner is not associated with the division on the record.

What Happens When the Picklist Value Group on a Record Changes

When the picklist value group on a record changes either because you select a new division that is associated with a different picklist value group or because you select a new picklist value group, any values that were previously selected in the picklist fields that are controlled by either the old picklist value group or the new picklist value group remain unchanged, even if the value that is selected in such a field is not linked to the new picklist value group. In such cases, you are not prompted to update the picklist value fields when you update other fields on the record. However, the next time that you edit a picklist field on the record, the following happens:

- If the picklist field is controlled by the new picklist value group, then only the values that are linked to the new picklist value group are available for selection. You can select a new value for the field, or you can cancel the edit operation to retain the existing value.
- If the picklist field is controlled by the old picklist value group but is not controlled by the new picklist value group, then all of the values are available for selection.

About Picklist Value Groups, Divisions, and Inline Edit

You cannot use the inline edit functionality to edit the Picklist Value Group field or the Division field on a record directly in a record Detail page or a record List page. To edit these fields, you must open the Edit page for the record.

About Picklist Value Groups and Divisions in Searches and List Filters

The following considerations apply to searches and list filters:

- Your administrator can add the Division field or the Picklist Value Group field or both to the search fields in the Action bar for record types that support divisions. You can then search for records by selecting a division or a picklist value group.
- If the Division field is available as a search field or list filter, then you can select any division as part of the criteria for the search or list filter. You are not limited to selecting only the divisions with which you are associated. Similarly, if the User field is also available as a search field or list filter and you select a user as part of your criteria, then you are not limited to selecting only the divisions that are associated with that user.
- If you select a division as part of the criteria for a search or list filter, then the picklist value group for that division is not automatically selected as part of your criteria, even if the Picklist Value Group field is one of the search fields for the record type.
- If you use a picklist field that is controlled by picklist value groups as part of the criteria for a search or list filter, then you can select any of the values in the picklist field as a filter for the search or list. The available values in the picklist field are not limited to the values that are linked to a specific picklist value group, even if you select a picklist value group as part of your criteria.
- You cannot search for division records or picklist value group records.

What Happens if Divisions are Merged or Deleted

Your administrator can delete a division or merge two or more divisions into one division. For information about what happens when divisions are merged or deleted, see About Merging Divisions and Deleting Divisions (on page 1172).

Related Topics

See the following topic for additional information:

- About Divisions and Picklist Value Groups on Records (on page 1173)

About Maskable Fields

A maskable field is a field in which some of the data can be hidden from view from some users. In Oracle CRM On Demand, your administrator can set up some custom maskable fields for certain record types. Your user role determines the behavior that you see for these custom maskable fields, as follows:

- If your user role does not include the View Masked Data privilege:
  - In all of the places where a maskable field is displayed for you, such as the record Edit, Detail, and List pages, only the last four characters in the field are unmasked. All of the other characters in the field are represented by the characters XXXX.

    For example, if the field contains the value 102030456789, then you see the following:

    XXXX6789

    However, you can update the maskable field. After you update the field, all but the last four characters of the value remain masked.

    NOTE: If a default value is assigned to a maskable field, then the full default value is displayed in the field when you create a new record, even if your user role does not include the View Masked Data privilege.
  - You cannot use a maskable field as a criterion to search for records or to filter lists. The maskable fields are not available to you in the Search section of the Action bar, the Advanced Search page, and in other areas where you can search for records and filter lists. If you attempt to open a list that includes a maskable field as a search criterion, or to use a maskable field to filter a list, then an error message is displayed.
  - You cannot use a maskable field to sort a list, even if the field is displayed in the list. If you attempt to use a maskable field to sort a list, then an error message is displayed.

- If your user role includes the View Masked Data privilege, then the maskable fields are available for you to view, update, and use in searches and lists in the same way as any other text field.

NOTE: Your administrator can set up a maskable field as read-only for the record type, or for a page layout. If a maskable field is set up as read-only for the record type, or for the page layout that is assigned to your role for the record type, then you cannot update the field. This is the case for all users, regardless of whether a user's role includes the View Masked Data privilege.

About Special Characters in Email Addresses

In the standard Oracle CRM On Demand application, you can use the following characters in the addresses in email fields:

- Uppercase and lowercase letters.
- The digits 0 through 9.

You can also use the following special characters, but only in the local part of the email address:

! # $ % & ' * + - / = ? ^ _ ` { | } ~

In addition, you can use the period character (.) in email addresses, but you cannot use consecutive periods. For example, the following are not valid:

- isa..mple@riqhtequip
- isample@riqhtequip..com

If your administrator selects the Allow Unicode Characters in Email Fields check box on the company profile, then you can use most Unicode (UTF-8) characters, including accented letters, in the address in the Email field on the Contact and Lead record types only. You can use the Unicode (UTF-8) characters in both the local and domain parts of these email addresses, although consecutive periods are still not allowed. In addition, the following characters are not allowed, even if the Allow Unicode Characters in Email Fields check box is selected on the company profile:

, ( ) [ ] : ; " < >

The following considerations apply when using email addresses that include special characters that are not supported in the standard Oracle CRM On Demand application:

- When you click an email address link in Oracle CRM On Demand to send an email, the email opens in your default email client. Your email client determines whether the email can be sent to the address. Similarly, when you click Send Email in the Appointment Detail page to send an email to the contacts on the appointment, your email client determines whether the email can be sent to the addresses of the contacts.
- The following applications do not support the full set of Unicode (UTF-8) characters in email addresses:
  - Oracle Outlook Email Integration On Demand
  - Oracle Notes Email Integration On Demand
  - Oracle CRM On Demand Disconnected Mobile Sales
  - Oracle CRM On Demand Connected Mobile Sales

  These applications support the set of characters that are supported for use in the standard Oracle CRM On Demand application. Any email addresses that include other special characters might not be recognized or displayed correctly in these applications.
- In workflow Send Email actions, if an expression in the To field of the workflow action returns an email address that contains any character that is not supported for use in email addresses in the standard application, then Oracle CRM On Demand cannot send email to that address, even if the Allow Unicode Characters in Email Fields check box is selected on the company profile.

For more information about the email address formats that are considered valid and invalid, see Field Type Guidelines for Importing Data (on page 1651).

About the HTML Editor

Depending on the setting in the Enable HTML Formatting check box on the company profile, HTML formatting might be available in certain fields. If the Enable HTML Formatting check box on the company profile is selected, then HTML formatting is supported in fields of the Note field type, including custom fields of that type. In many record types, the Description field is a Note field. The record types that have one or more fields of the Note field type are:

- Account
- Accreditation
- Accreditation Request
- Activity
- Blocked Product
- Campaign
- Certification
- Certification Request
- Claim
- Custom Objects 01 through 40
- Contact
- Course Enrollment
- Damage
- Deal Registration
- Exam
- Exam Registration
- Financial Account
- Financial Plan
- Financial Product
- Fund
- Household
- Insurance Property
- Involved Party
- Leads
- MDF Request
- Notes (for notes that are created from the Notes related information section in parent record types only)
- Opportunity
- Order
- Partner
- Partner Type
- Patient
- Price List
- Price List Line Item
- Quote
- Sample Request
- Service Request
- Signature
- Solution
- SP Requests
- Special Pricing Product

- Special Pricing Request

The Enable HTML Formatting check box on the company profile is deselected by default in the standard application. If your administrator selects the Enable HTML Formatting check box, then the following happens:

- An HTML editor is available for the supported fields when you create or edit records where the fields are available, and the HTML formatting is applied when you view the records.

  NOTE: You must use the toolbar in the HTML editor to apply HTML formatting to the text in the field. Tags that are entered as text while the HTML editor is enabled are not interpreted as HTML tags.

- When you export records from Oracle CRM On Demand, the tags for any HTML formatting that was applied through the HTML editor are exported with the text.
- When you import records, any supported HTML tags in the supported fields are imported and are applied when the records are viewed in the user interface. Any unsupported HTML tags are removed before the imported records are saved.
- Any text that users entered in a field that supports HTML formatting before the Enable HTML Editor check box is selected on the company profile is treated as unformatted text, even if the text contains HTML tags. However, after the Enable Editor check box is selected on the company profile, the next time the field is updated or the record is edited in the record Edit page, any supported HTML formatting is applied to the field, and if there is more than one field that supports HTML formatting on the record Detail or Edit page, then any supported HTML tags in those fields are also applied at the same time.

  NOTE: If the field is edited inline after the Enable Editor check box is selected on the company profile, but no change is made to the field, then the existing text in the field remains as plain text.

- When a field that supports HTML formatting is displayed in a list of records, any supported HTML tags in the field are applied, provided that the field does not contain more than 500 characters. If the field contains more than 500 characters, then only the first 500 characters are displayed, and the displayed characters and any HTML tags are displayed as plain text. However, when you edit the field inline in a List page, the entire content of the field is displayed, the HTML formatting is applied, and the HTML editor is available.

NOTE: The same elements and attributes that are supported for HTML in workflow email messages are supported in the fields where HTML formatting is supported. For a list of supported elements and attributes, see HTML Code for Note Fields and Workflow Email Messages (on page 63).

If the Enable HTML Formatting check box is not selected on the company profile, then the following happens:

- The HTML editor is not available in fields of the Note field type.
- If you import records containing HTML tags in fields of the Note field type, then the tags are not removed and are displayed as unformatted text when the records are viewed in the user interface.

If your administrator selects the Enable HTML Formatting check box and later deselects it again, then all text and the tags for any HTML formatting that was applied in the fields where HTML formatting is supported are displayed as unformatted text.

Message Center

The Message Center does not support HTML formatting. The HTML editor is not available for notes that you create either in the Message Center or by clicking the note icon at the top-right of a record Detail page, even if the Enable HTML Formatting check box is selected on the company profile. A note containing HTML tags is displayed as unformatted plain text in the Message Center.

HTML Code for Note Fields and Workflow Email Messages

If the Enable HTML Formatting check box on the company profile is selected, then HTML formatting is supported in fields of the Note field type, including custom fields of that type. When using HTML code in a field of the Note type, you must use the toolbar in the HTML editor to apply HTML formatting to the text in the field. Tags that are entered as text while the HTML editor is enabled are not interpreted as HTML tags.

HTML Formatting in Workflow Email Messages

HTML formatting is also supported in the Message Body field in workflow Send Email actions. When you create a workflow Send Email action, you can select either HTML or plain text for the format of the message in the email. Note the following points when editing the message:

- Starting with Release 43, if you select the HTML option, then an HTML editor is available in the Message Body field, and you can use the toolbar in the HTML editor to apply HTML formatting to the text. Note that tags that are entered as text while the HTML option is selected are not interpreted as HTML tags.
- For Send Email actions that were created in a release earlier than Release 43, if the HTML option was selected when the action was created, then the next time the action is edited in Release 43 or later, the HTML editor is available in the Message Body field and any HTML formatting that is supported is automatically applied to the message the next time the action is edited and saved.
- When you create a Send Email action, you can toggle between the HTML and Plain Text options. Any formatting that you apply while the HTML option is selected is shown as HTML tags when you switch to the Plain Text option. When you switch from the Plain Text option to the HTML option, any supported HTML formatting that is included in the message is applied.
- Oracle CRM On Demand supports a subset of the elements that are supported in HTML5. If you save the message while the HTML option is selected, then the following happens:
  - If the message includes an HTML element that Oracle CRM On Demand does not support, then the tags for the unsupported element are removed from the email message when you save the workflow action. No error message appears. In the case of certain elements, the content of the element is also removed from the message.
  - If the message includes an attribute that Oracle CRM On Demand does not support, then the attribute is removed.
  - If the message specifies a property for the style attribute that Oracle CRM On Demand does not support for use with the style attribute, then the property is removed.
- If an expression within the HTML email message evaluates to a string that contains an HTML tag, then when Oracle CRM On Demand sends the email, the tag is encoded so that it is treated as text rather than HTML code by the recipient's email application.

  For example, assume that an email message contains the expression %%%[{Description}]%%% to return the value of the Description field, and that the Description field contains the following HTML code:

  This is the description

  In this case, when the expression is evaluated, the tags that are returned as part of the value of the field are not interpreted as HTML code. Instead, the value of the Description field appears in the email message exactly as it appears in the Description field in Oracle CRM On Demand, including the and tags.
- If the recipient's email application does not support HTML, then the email application determines how the HTML message is displayed for that recipient.

The rest of this topic provides details of the supported and unsupported elements for Note fields and HTML messages in workflow Send Email action.

Supported Elements and Attributes

The following table lists the elements that Oracle CRM On Demand supports for use in workflow email messages and in fields of the Note type, and the attributes that are supported for the elements. For information about the properties that are supported for use with the style attribute, see the Supported Properties for the style Attribute section of this topic.

Supported Elements	Supported Attributes
<a>	- href - rel - style **NOTE:** Using any value other than nofollow with the rel attribute for the <a> element might cause cross-site scripting security issues.
<abbr>	- style - title
<address>	style
<b>	style
<bdo>	- dir - style
<big>	All attributes
<blockquote>	style
 	style
<caption>	style
<center>	All attributes
<cite>	style
<code>	style
<col>	- span - style
<colgroup>	- span - style
<dd>	style
<del>	style
<dfn>	style
<div>	style
<dl>	style

Supported Elements	Supported Attributes
<dt>	style
<em>	style
<fieldset>	style
<font>	■ face ■ size
<h1>	style
<h2>	style
<h3>	style
<h4>	style
<h5>	style
<h6>	style
<hr>	style
<i>	style
<img>	■ alt ■ border ■ height ■ src ■ style ■ width
<ins>	style
<legend>	style
	style
	style
<p>	style
<pre>	style
<q>	style
<s>	style

Supported Elements	Supported Attributes
<samp>	style
<small>	style
<span>	style
<strike>	All attributes
<strong>	style
<sub>	style
<sup>	style
<table>	style
<tbody>	style
<td>	■ colspan ■ headers ■ rowspan ■ style
<tfoot>	style
<th>	■ abbr ■ colspan ■ headers ■ rowspan ■ scope ■ style
<thead>	style
<tr>	style
<tt>	All attributes
<u>	style
	style
<var>	style

For more information about HTML5, see the HTML5 specification on the World Wide Web Consortium (W3C) Web site.

Unsupported Attributes

If you edit a workflow Send Email action that contains an unsupported attribute in the email message, then the attribute will be deleted when you save the updated workflow action.

If you attempt to include an unsupported attribute in the email message when you create a new workflow Send Email action, then the attribute will be deleted when you save the workflow action.

If a field of the Note field type contains an unsupported attribute, and if the Enable HTML Formatting check box on the company profile is selected, then the attribute will be deleted the next time the field is updated and the record is saved.

Supported Properties for the style Attribute

The following cascading style sheet (CSS) properties are supported for use with the style attribute, which can be used with all of the elements that are supported for use in the messages in workflow emails and in fields of the Note type:

- color
- font-family
- font-size
- font-style
- list-style-position
- list-style-type
- text-align

If you use a property that Oracle CRM On Demand does not support for use with the style attribute in a workflow email message, then the unsupported property is removed from the style attribute when you save the workflow action.

If the Enable HTML Formatting check box on the company profile is selected, then:

- If an unsupported property is used with the style attribute in a field of the Note type on an imported record, then the property is removed from the style attribute when the record is imported.
- If an unsupported property was used with the style attribute in a field of the Note type before the Enable HTML Formatting check box was selected, then the property is removed from the style attribute the next time the field is updated or the record is edited in the record Edit page after the check box is selected.

Unsupported Elements

If you use an HTML element that Oracle CRM On Demand does not support for use in a workflow email message, then the tags for the unsupported element are removed from the email message when you save the workflow action. No error message appears.

If the Enable HTML Formatting check box on the company profile is selected, then:

- If an unsupported element is used in a field of the Note type on an imported record, then the tags for the element are removed when the record is imported.
- If an unsupported element was used in a field of the Note type before the Enable HTML Formatting check box was selected, then the tags for the unsupported element are removed the next time the field is updated or the record is edited in the record Edit page after the check box is selected.

When an unsupported element is removed, the content of the element is retained, except in the case of the following elements. For these elements, both the tags and the content of the element are removed for security reasons:

- <applet>
- <area>
- <base>
- <basefont>
- <button>

- <form>
- <frame>
- <frameset>
- <iframe>
- <input>
- <isindex>
- <label>
- <link>
- <map>
- <menu>
- <noframes>
- <noscript>
- <object>
- <optgroup>
- <option>
- <param>
- <script>
- <select>
- <style>
- <textarea>

Deprecated Attributes

Some attributes that were supported in the past have now been deprecated. The deprecated attributes are not automatically deleted from any existing workflow email message unless the workflow action is edited. Similarly, the deprecated attributes are not automatically deleted from a field of the Note field type, unless the record with the field is edited. However, the attributes might not work at all, or might not work as expected.

The following table lists the deprecated attributes.

Supported Elements	Deprecated Attributes
<col>	■ align ■ valign ■ width
<colgroup>	■ align ■ valign ■ width
<div>	align
<hr>	■ align ■ size ■ width

Supported Elements	Deprecated Attributes
<img>	▪ align ▪ hspace ▪ vspace **NOTE:** If any of the deprecated attributes are used with the <img> element in an existing workflow email message or a field of the Note field type, then cross-site scripting security issues could arise.
<p>	align
<table>	▪ align ▪ bgcolor ▪ border ▪ cellpadding ▪ cellspacing ▪ height ▪ width
<td>	▪ abbr ▪ align ▪ bgcolor ▪ height ▪ width
<th>	▪ align ▪ bgcolor ▪ height ▪ width
<tr>	▪ align ▪ height ▪ valign ▪ width

Displaying Images on Record Detail Pages

For certain record types, your company administrator can specify that an image can be displayed on the record Detail pages. If your administrator specifies that an image can be displayed on a record Detail page, then a placeholder for an image appears at the top left of the Detail page, and you can upload the image that you want to display. You cannot change the location of the image on the page.

The ability to display an image on a record Detail page is available for the following record types:

- Account
- Contact
- Product

You can upload images files of the following file types:

- .jpg
- .jpeg
- .png
- .gif
- .bmp

The file that you upload must be less than 5 megabytes (MB). The maximum height of the displayed image is 150 pixels, and the maximum width is 150 pixels. If the image that you upload exceeds the maximum height or width, then the image is automatically resized before the image file is saved in Oracle CRM On Demand. The ratio of the height to the width is maintained. For example, if you upload an image that is 1500 pixels high and 1000 pixels wide, then the image is automatically resized to be 150 pixels high and 100 pixels wide. If the image that you upload is smaller than the maximum height and width, then the image is not resized.

The following procedure describes how to upload an image to be displayed on a record Detail page. You cannot upload an image to a record while creating a record. You must first create the record and save it, and then upload the image to the record. You can upload an image to an existing record provided that you have the necessary access rights to update the record.

NOTE: If an image was previously displayed on the record, then the image that you upload replaces the image that was previously displayed. The image file that was previously displayed is deleted from Oracle CRM On Demand, and you cannot restore it.

To upload an image to a record Detail page

1. In the record Detail page, rest your pointer on the image placeholder so that the image menu displays, and then click Menu.
2. Click Choose File to open a dialog box where you can select a file.
3. Browse to the file that you want to upload and select it.

   The image that you selected is displayed in the image field.

The following procedure describes how to remove an image from a record Detail page.

NOTE: When you remove an image from a Detail page, the image file is deleted from Oracle CRM On Demand, and you cannot restore it.

To remove an image from a record Detail page

1. In the record Detail page, rest your pointer on the image to display the image menu, and click Remove.
2. Confirm that you want to remove the image file.

About the Record Indicators for Related Information Sections

If your user role has the Personalize Detail Page - Records Indicator privilege, then you can set up record indicators for the related information sections on record Detail pages. The record indicators allow you to see whether any records are present in a related information section, without opening the section. Your administrator can also configure the record indicators for the Detail pages for the record types at role level. If you do not personalize the record indicator settings for a record type, then the settings that are configured for the record type for your role are used.

NOTE: The related indicator functionality is not supported for the Attachments related information section on any record type, or for the User List related information section on the Division record type. In addition, the functionality is not supported for custom Web applets.

This topic describes the behavior of the record indicators for the related information sections. For information about personalizing the record indicator settings, see Managing Record Indicators for Related Information Sections (on page 757).

The indicator icons are as follows:

- An asterisk (*) indicates that there is at least one record in the related information section.
- A circle with a line through it indicates one of the following:
  - There are no records in the related information section.
  - You user role and access profiles do not allow you to access the related information section.

Record Indicators in Classic Themes

If you use a classic theme, then for any related information section for which the indicators are set up to appear, the indicators are displayed as follows:

- If the related information sections are shown as tabs:
  - When the tab is not open, the indicator is displayed on the tab.
  - When the tab is open, the indicator is not displayed.
- If the related information sections are shown as lists:
  - When the list is collapsed, the indicator is displayed in the title bar of the list.
  - When the list is expanded, the indicator is not displayed.

Record Indicators in Modern Themes

If you use a modern theme, then for any related information section for which the indicators are set up to appear, the indicators are displayed as follows:

- If the related information sections are shown as tabs:
  - When the tab is not open, the indicator is displayed on the button for the related information section.
  - When the tab is open, the indicator is not displayed.
- If the related information sections are shown as lists:
  - When the list is collapsed, the record indicator is displayed on the button for the related information section and also in the title bar of the list.
  - When the list is expanded, the record indicator is not displayed in the title bar of the related information section. However, the record indicator continues to be displayed on the button for the related information section.

Dynamic Updates for Record Indicators

If you add one or more records in a related information section that previously contained no records, then when you close the tab or collapse the list, the indicator is usually updated dynamically to show that the related information section now contains records. Similarly, if you remove all of the records from a related information section, then when you close the tab or collapse the list, the indicator is usually updated dynamically to show that the related information section contains no records.

However, in some cases, a change to the contents of a related information section does not require the related information section to be refreshed, and in such cases the record indicators are not updated dynamically. For example, if you edit the Account field on a contact record inline on the Contact Detail page to add a primary account to the contact, and if the contact previously had no account linked to it, then the record indicator for the Accounts related information section on the Contact Detail page is not updated dynamically. In such cases, the record indicators are updated the next time that you open the Detail page for the parent record, or you manually refresh your browser when viewing the record Detail page.

Record Indicators in the Head-Up Display

If the head-up display is visible, then the record indicator for a related information section appears to the right of the link to the related information section in the head-up display. This is the case for any related information section for which the record indicators are set up to appear, in both classic themes and modern themes. The record indicator appears in the head-up display regardless of whether a related information tab is open or closed, or a related information list is expanded or collapsed. For information about using the head-up display, see Oracle CRM On Demand Page-by-Page Overview (on page 35).

About Record Indicators and Filters in Related Information Sections

If the related information sections on your record Detail pages appear as tabs, and if the Enable Enhanced View for Tabs check box is selected on the company profile, then you can apply filters to the lists of records in the related information sections. If necessary, the record indicators are updated dynamically to reflect any filters that you apply to the list of related records. For example, if you apply a filter so that no records are shown in the related information section, and if you then open a different tab on the Detail page, then the indicator for the filtered related information section changes to indicate that the section contains no records.

Your administrator can optionally set up a default filter for a list of records in a related information section. If the default filter results in no records appearing in the related information section, then the record indicator for the section indicates that the section contains no records. For more information about custom default filters for related information sections, see Managing Default Filter Criteria for Related Items (on page 1264).

About the Enhanced View for Related Information Tabs

At the bottom of a record Detail page, you can access related information sections that contain lists of records that are linked to the main record. In the standard application, each related information section on the Detail page shows up to five records of one record type, but if you want to see more records, or perform list actions such as filtering or sorting, then you must open the full list of related records by clicking the Show Full List link.

However, if the related information sections on your record Detail pages appear as tabs, and if the Enable Enhanced View for Tabs check box is selected on the company profile, then you can perform the following additional actions in the related information sections on record Detail pages:

- In the Number of records displayed field at the bottom of the related information section, select a number of records to see at once in the related information section. You can choose to see 5, 10, 25, 50, 75, or 100 records in the section at one time. After you change the number of records displayed in a related information section, the new setting applies to all related information sections that support the enhanced functionality on all record Detail pages, and the setting is maintained until you change it again.

  NOTE: The number of records that you choose to display in the lists in related information sections is independent of the number of records that you choose to display in the main List pages for the record types, and is also independent of the number of records that you choose to display in the List pages that open when you click the Show Full List link in the related information sections.

- If there are more records in the list than can be shown in the current page, move to the next page, previous page, first page, or last page in the list, by clicking the navigation icons at the top or bottom of the related information section.
- Sort the list by clicking a column heading, if the field is supported for sorting for the current list.
- Filter the list. For information about filtering lists, see Filtering Lists (on page 136).

  NOTE: Your administrator can optionally set up a custom default filter that is applied the first time you open the record Detail page. If a custom default filter is applied, then the Quick Filter fields in the related information section are prepopulated with the filter criterion. You can clear the filter or apply a different filter. However, after you navigate away from the record Detail page and then return to it, the custom default filter is applied again. For more information about custom default filters for related information sections, see Managing Default Filter Criteria for Related Items (on page 1264).

  When a filter is applied to the related information section, an asterisk (*) appears beside the Advanced link in the section.
- Perform an advanced search of the related records. For more information, see Performing Advanced Search of a Single Record Type (on page 97) and About Advanced Search of Related Records (on page 95).

The list page that you display, and the sort order and filters that you apply in the related information section, remain active when you do the following:

- Open a different related information section on the page and then open the original related information section again.
- Edit a field inline in the related information section.
- Edit a field inline in the parent record. However, if you change the driving picklist field for a dynamic layout, and the page layout changes as a result, then the first page of the list is shown, the filter that you applied is cleared, and the sort order returns to the default sort order. If a custom default filter is set up for the list, then the custom default filter is applied again.
- Open the full list of related records by clicking Show Full List.

  In this case, although the sort order and filters that you apply in the related information section also apply in the full list page, the first page of the list is displayed, even if you had a different page of the list open in the related information section on the record Detail page.

  When you return to the parent record Detail page from the full list of related records, the sort order and any filters that you applied to the list are cleared, and the first page of the list is displayed again. If a custom default filter is set up for the list, then the custom default filter is applied again.

NOTE: If your user role has the Personalize Detail Page - Records Indicator privilege, then you can set up the related information sections so that graphical indicators appear on the related information sections to indicate whether any records are present in the sections. If necessary, the record indicators are updated dynamically to reflect any filters that you apply to the list of related records. For example, if you apply a filter so that no records are shown in the related information section, and if you then open a different tab on the Detail page, then the indicator for the filtered related information section changes to indicate that the section contains no records. For information about the behavior of the record indicators, see About the Record Indicators for Related Information Sections (on page 71). For information about personalizing the record indicator settings, see Managing Record Indicators for Related Information Sections (on page 757).

The sort order and any filters that you apply in a related information section are cleared, and the first page of the list is displayed again, when you perform any of the following actions:

- Navigate away from the parent record Detail page through any action other than clicking Show Full List. Clicking New to add a new record of the parent record type, or clicking Edit to update the parent record in a separate page, are examples of actions that navigate away from the parent record Detail page.
- Return to the parent record Detail page from the full list of related records.
- Click Add or New in the related information section, to link a record to the parent record.
- Click the Edit, Remove, or Delete link for a record in the related information section.

NOTE: The enhanced functionality described in this topic is not available if the related information sections on record Detail pages are displayed as lists rather than as tabs. In addition, some lists of linked records do not support the enhanced functionality described in this topic, even if the related information sections are displayed as tabs and the Enable Enhanced View for Tabs check box is selected on the company profile.

Finding Records

You can find records in several ways in Oracle CRM On Demand:

- Searching for Records in the Action Bar (on page 85)
- Using Advanced Search (on page 92)
- Finding Records in List Pages (on page 100)
- Searching for Records in Lookup Windows (on page 101)
- Finding Records Using Enhanced Keyword Search (on page 108)

Related Topics

See the following topics for related information about searching for records:

About Targeted Search

You can perform two types of search in Oracle CRM On Demand: targeted search and keyword search. Your company administrator determines which type of search is used by default for your company, by selecting the search type on the company profile page. Targeted search is the recommended search type. For information about keyword search, see About Keyword Search (on page 83).

You can use targeted search in several places in Oracle CRM On Demand, as follows:

- **The Search section of the Action bar.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Search section of the Action bar for your company. For more information about searching for records in the Action bar, see Searching for Records in the Action Bar (on page 85). Type-ahead search of recently viewed records is supported in certain fields in the Search section of the Action bar, for targeted search only. For more information, see Support for Type-Ahead Search in Targeted Search (on page 87).
- **Lookup windows.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Lookup windows where you search for records to link to the record that you are working with. For more information about searching for records in Lookup windows, see Searching for Records in Lookup Windows (on page 101).
- **The Advanced Search page in Oracle CRM On Demand.** In the Advanced Search page, the type of search depends on the options that you select, as follows:
  - If you search multiple record types, then the search is a keyword search.
  - If you search a single record type, then the search is a targeted search.

  For more information about using advanced search, see Using Advanced Search (on page 92).
- **Quick Filter fields in List pages.** Searches using the Quick Filter fields in List pages are always targeted searches even if keyword search is selected as the default search type for your company.

For targeted searches, your user role determines which record types you can search and which fields you can search on each record type, as follows:

- If your company administrator does not make any search fields available in the search layout that is assigned to your user role for a record type, then the following happens:
  - You cannot search for records of that type in the Search section of the Action bar.
  - You cannot specify any search criteria for an advanced search of that record type. Running an advanced search without any search criteria returns all of the records of that record type that your user role and access settings allow you to see.
  - You cannot use the Quick Filter fields in Lookup windows.
  - You cannot specify any search criteria for a list of records of that record type. For more information about creating and refining lists, see Creating and Refining Lists (on page 130).
- For any record type, you might see multiple search fields in the Search section of the Action bar and in the Quick Filter fields in Lookup windows, depending on which fields your company administrator makes available in the search layout that is assigned to your user role for the record type.

- If the All Fields in Search and Lists privilege is enabled for your user role, then you can search all of the search fields that your company administrator makes available in the search layout that is assigned to your user role for the record type, in any of the following places:
  - Action bar
  - Lookup windows
  - Advanced search

  NOTE: It is recommended that company administrators do not enable the All Fields in Search and Lists privilege for most user roles. When the privilege is not enabled, fields that your company does not use are not visible in search and list pages. This reduces clutter and makes it easier for users to see the fields that they are most interested in.

- If the All Fields in Search and Lists privilege is not enabled for your user role, then you can search a field in the Action bar, Lookup windows, or advanced search, only if the field meets both of the following criteria:
  - The field is an available search field in the search layout that is assigned to your user role for the record type.
  - The field is displayed on the Detail page layout that is assigned to your user role for that record type. If dynamic page layouts are defined for your role, then the field must be displayed on at least one of the dynamic page layouts.

    NOTE: *Dynamic 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.

Your administrator can specify a default value for one or more of the search fields for targeted searches, but you can change the value. You can see the filter condition as tooltip text by resting your pointer on the search field in the Action bar, unless the field is a check box field. The tooltip text is not available for check box fields.

Targeted search returns only those records that meet all of the specified criteria, which is equivalent to using an AND condition between the search fields. If you leave a search field blank, then that field is not considered in the search. However, if a check box field is present in the search layout, then the value of the check box field is always included as part of the search criteria. If you select the check box, then Oracle CRM On Demand interprets the check box value as True or Yes. If you deselect the check box, then Oracle CRM On Demand interprets the check box value as False or No.

The search layout that is assigned to your user role for a record type determines which fields display as columns in the list of records returned by a search of that record type.

NOTE: You cannot specify a null value in a field in a search from the Action bar. To specify a null value, you must use Advanced Search. For more information, see Using Advanced Search (on page 92).

About Wildcards in Targeted Search

By default, every search value entered in a targeted search field is appended with a wildcard or asterisk (*) so you do not need to append a wildcard to your search string. You can prefix your search values with a wildcard, or you can use a wildcard between the search values. You cannot use the wildcard in picklists where values are predetermined. For example, in a targeted search of account records, the default search layout allows you to enter search strings for the Account Name field and the Location field. Both of these fields are case-insensitive. If you enter *C* in the Account Name field and *Head* in the Location field, then the targeted search expression is interpreted as follows:

Show all accounts where Account Name is like *C** and Location is like *Head**

The search returns all accounts where the account name starts with the letter *C* (uppercase and lowercase) and where the value in the Location field begins with the word *Head* (any mixture of uppercase and lowercase).

NOTE: Using the wildcard affects search performance. Searches where a search value is prefixed with a wildcard are the slowest.

The use of wildcards is restricted when you search for exact matches as described in the following section.

About Searching for Exact Matches

If you know the exact value in a field on the record that you are searching, then you can search for exact matches by prefixing the search string with an equal sign (=). When you prefix a search string with an equal sign, targeted search behaves as follows:

- A wildcard is not appended to the end of the search string.

  If the search field is a case-sensitive field, then the search returns exact matches for the search string. If the search field is a case-insensitive field, then the search returns matches including mixed-case matches.

  For example, if you enter =*Acme* as the search value in the Account Name field, the search returns all account records where the account name is *Acme* or *ACME*, or other mixed-case variations, because Account Name is a case-insensitive field. The search does not return any record where the account name contains the word *Acme* but also contains other characters, for example, *Acme Inc*, *Acme Incorporated*, or *Acme SuperStore*.
- If you explicitly use a wildcard in the search string, then the wildcard is treated as text.

  For example, assume that there are two account records with the account names: *Acme** and *Acme Super Store*. If you enter =*Acme** in the Account Name search field, then the search returns the record where the account name is *Acme**. The search does not return the record where the account name is *Acme Super Store*.
- If the field value in a record starts with an equal sign, then only the second equal sign that you enter in the search field is treated as part of the search string.

  For example, assume that there are two account records with the account names: =*Acme Super Store* and *Acme Super Store*. If you enter ==*Acme Super Store* in the Account Name field, then the search returns the record where the account name is =*Acme Super Store*. The search does not return the record where the account name is *Acme Super Store*.

The following restrictions apply to the use of the equal sign as a prefix:

- The prefixed equal sign is not supported for search fields of the Phone field type.
- You cannot prefix a value in a picklist search field with the equal sign.

About Filter Conditions

For searches, different filter conditions are available depending on the data type of the search field, as shown in the following table.

NOTE: In some cases, a search does not return records that have a null value in a field that you use in the criteria for a search or list filter. For example, if you search for opportunities that have a status that is not equal to Won, then opportunities that have a null status are not returned. If you want your search to return records that have a null value in a field, then include an Is NULL condition for that field. In the example used earlier, if you want your search to return opportunities that have a null status as well as opportunities that have a status other than Won, then include an Is Null condition for the status field in the search criteria, as well as the condition to find records that have a status that is not equal to Won.

Data Type	Filter Conditions Available
Number, Integer, Percent, Currency	• Between • Equal to • Greater than • Less than • Is NULL • Is not NULL • Not equal to • Not Between

Data Type	Filter Conditions Available
Date, Time	- Between - Equal to - In the last 90 days - In the next 90 days - On - On or after - On or before - Today * - Yesterday* - Tomorrow* - In the last ? day - In the next ? day - Last Week* - Next Week* - This Week* - Last Month* - Next Month* - This Month* - This Quarter* - Last Quarter* - Next Quarter* - This Year* - Next Year* - Last Year* - Is NULL* - Is Not NULL* - Not equal to - Not Between For conditions marked with an asterisk (*), the value field is disabled when the condition is selected. For the condition In the last ? day, and In the next ? day, the variable ? is substituted with a number of days selected in the filter value field.
Checkbox	- Is checked - Is not checked
Picklist	- Contains all values - Contains at least one value - Contains none of the values - Equal to - Equals any* - Is NULL - Is not NULL - Not equal to

Data Type	Filter Conditions Available
	Between* Greater than* Less than* For information about the conditions marked with an asterisk (*), see the About Filter Conditions for Picklist Fields section of this topic.
Text	Between Contains all values Contains at least one value Contains none of the values Equal to Greater than Less than Is NULL Is not NULL Not equal to Begins with Does not begin with Is Like Is not Like Not Between
Phone	Begins with Between Contains all values Contains at least one value Contains none of the values Equal to Greater than Less than Not equal to

About Filter Conditions for Picklist Fields

For the Between, Greater than, and Less than conditions for picklist fields, Oracle CRM On Demand searches the language independent codes (LICs) of the picklist values and not the picklist values themselves, to find the records that meet the filter criterion that you specify. So, your search results include all records in which the LIC of the picklist value meets the criterion, even if the picklist value itself does not. Similarly, your search results do not include records in which the picklist value meets the criterion, but the LIC of the picklist value does not.

For example, assume that your administrator creates a picklist value called Beta. The LIC for the new picklist value is the same as the picklist value by default. So, a search with the following filter returns records in which the picklist value is Beta:

Between Alpha, Gamma

However, if your administrator later changes the picklist value from Beta to Not Beta, then the LIC for the picklist value does not change. So, if you search for records using the filter shown above, then your search results include all records in which the picklist value is Not Beta, because the LIC for the picklist value is still Beta.

However, if you search for records using the following filter, then your search results do not include records in which the picklist value is Not Beta, because the LIC for the picklist value does not meet the specified criterion:

Between Gamma, Zeta

Similarly, if you search for a translated version of a picklist value, then your search results include all records in which the LIC of the picklist value meets the specified criterion, even if the translated picklist value does not.

For conditions for picklist fields other than the Between, Greater than, and Less than conditions, Oracle CRM On Demand searches the picklist values themselves and not the LICs, to find the records that meet the filter criterion that you specify.

Equals Any Filter Condition

The Equals any filter condition searches for records that exactly match any one of the specified values. This filter condition is supported only for picklist fields for which the Lookup icon (magnifying glass) is available in record Detail pages and Edit pages. It is not supported for picklist fields for which a drop-down list of values is available in record Detail pages and Edit pages. For this type of picklist field, use the Contains all values filter condition to search for records that exactly match any one of the specified values.

In addition, the Equals any filter condition is not supported for multi-select picklist fields. For information about searching on multi-select picklist fields, see About Searching on Multi-Select Picklists (see About Searching on Multi-Select Picklists on page 83).

How Filter Conditions Are Used

The following table shows how various filter conditions and operators are used:

Use This	With	To Match	For These Results
Between	Text, numbers or dates	Two values separated by commas	Displays records with values between A and B (excludes values equal to A and B).
Contains all values (equal to)	Text, numbers, or dates	Single or multiple values separated by commas	Displays records matching the exact values. The application does not retrieve substrings of the values, or the same value with different capitalization (uppercase or lowercase).
Contains at least one value	Text only	Single or multiple values separated by commas	Displays records that partially match the values (allows substring matching). For example, entering *Brown* retrieves records with *Browns Trucking*, *Browning Equipment*, and *Lester Brown Car Wash*. **NOTE:** This behavior applies to filtered lists only, and not to other areas in Oracle CRM On Demand that use the condition, Contains At Least One Value. Also, using this condition affects the speed at which the records are retrieved, because Oracle CRM On Demand looks for partial matches.
Contains none of the	Text, numbers, or dates	Single or multiple values	Displays records *not* matching the values. This is the inverse of *Contains all values*.

Use This	With	To Match	For These Results
values (not equal to)		separated by commas	
Equal to	Text, numbers, or dates	Single value for each line. To add values, use the operator OR and add another line.	Displays records matching the values.
Equals any	Picklist	Single or multiple values separated by commas	Displays records that exactly match any one of the values. **NOTE:** For more information about the Equals any filter condition, see the About Filter Conditions for Picklist Fields section of this topic.
Greater than	Text, numbers or dates	Single value	Retrieves records with a value greater than the entered value.
Less than	Text, numbers or dates	Single value	Retrieves records containing a value less than the entered value
Operator			
AND	Text, numbers, or dates	Two or more conditions	Displays records for which all given conditions are true. For example, entering Close Date > 10/01/2003 AND Revenue > 500000 will return records that match *both* criteria.
OR	Text, numbers, or dates	Any condition	Displays records for which at least one condition is true. For example, entering Industry = Energy OR Billing State=CA returns records that match *either* of these criteria.

About Filter Values

When you search for records, depending on the filter condition that you choose, you must enter a filter value.

When entering filter values for a search, follow these guidelines:

- Use commas to separate values in a list of values with any of the following conditions:
  - Contains all values
  - Contains at least one value
  - Contains none of the values

  - Equals any
- For all field types except picklist fields, do not use a comma within a value in a list of values with any of the following conditions:
  - Contains all values
  - Contains at least one value
  - Contains none of the values
  - Equals any

  Commas are treated as separators in the list of values, and therefore cannot be used within the values themselves. If the values for the filter contain commas, use a combination of other conditions to create the filter that you want.

  For picklist fields, you can use a value that contains a comma, provided that the comma is followed by a space. A comma that is followed by a space is not treated as a separator in the list of values.
- For numeric values, do not use commas to indicate values in thousands.
- You can use partial words with the Contains at least one value condition. However, using partial words with the other conditions does not retrieve the records that you want.

  NOTE: This behavior applies to filtered lists that use the Contains at least one value condition and not to other areas in Oracle CRM On Demand.
- For dates, enter them in the format that your company uses but include four digits for the year, such as 2003.
- For currency, omit commas and symbols, such as the dollar sign ($).

Using Wildcards with Filter Values

You can use the wildcard characters (* and ?) in searches of text and phone fields only where the filter condition is Begins with.

CAUTION: Using the asterisk character (*) might result in slow performance if used with large amounts of data.

You can use wildcards in the following types of search:

- The Search Criteria section in Advanced Search
- The Search Criteria section in the Create List and Refine List pages
- Alpha Search on List pages
- Quick Search on List pages
- The Search section in the Action bar

For telephone number fields, you can, for example, search for all telephone numbers of a certain area code. To do this, click the phone icon, and in the Phone Number pop-up, enter the area code and then the asterisk (*) wildcard in the Local Number field.

About Default Values in Search Fields

Depending on how your administrator sets up the search layout for a record type for your user role, the search fields for that record type might be automatically populated with default values in the following locations:

- The Targeted Search applet in the Action bar.
- The Advanced Search criteria form.
- The criteria section of the New List page when you create a new list.

  NOTE: When you refine an existing list, the list of search fields and the conditions and values for those search fields are determined by the current list filter.

NOTE: For the Activity record type, the search fields might be automatically populated in the Targeted Search applet in the Action bar and in the Advanced Search criteria form when you search for appointments or tasks, but the search fields are never preselected or populated when you create a new list for the Activity record type.

You can change the condition and the value for any search field.

About Searching on Multi-Select Picklists

You can search and query on all of the values of a multi-select picklist field. A *multi-select picklist* is a picklist from which you can select multiple values when entering record information.

Multi-select picklist fields are supported as columns in target search results and in target search filter criteria.

The following list shows how the multi-select picklist values in the filter criteria and the filter condition determine which records are found in the search:

- **Contains all values**. A record is found if all the specified filter values match the multi-select picklist values of a searched record.
- **Contains at least one value**. A record is found if any of the specified filter values match the multi-select picklist values of a searched record.
- **Contains none of the values**. A record is found if none of the specified filter values match the multi-select picklist values of a searched record.

About Keyword Search

You can use two types of search in Oracle CRM On Demand: targeted search and keyword search. Your company administrator determines which type of search is used by default for your company, by selecting the search type on the company profile page. Targeted search is the recommended search type. For more information about targeted search, see About Targeted Search (on page 75).

You can use keyword search in several places in Oracle CRM On Demand, as follows:

- **The Search section of the Action bar.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Search section of the Action bar for your company. For more information about searching for records in the Action bar, see Searching for Records in the Action Bar (on page 85).
- **Lookup windows.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Lookup windows where you search for records to link to the record that you are working with. For more information about searching for records in Lookup windows, see Searching for Records in Lookup Windows (on page 101).
- **The Advanced Search page in Oracle CRM On Demand.** In the Advanced Search page, the type of search depends on the options that you select, as follows:
  - If you search multiple record types, then the search is a keyword search.
  - If you search a single record type, then the search is a targeted search.

  For more information about using advanced search, see Using Advanced Search (on page 92).

NOTE: Searches using the Quick Filter fields in List pages are always targeted searches, even if keyword search is selected as the default search type for your company.

If your company administrator selects keyword search as the search type for your company, you see only one search field in the Search section in the Action bar and in Lookup windows. A keyword search searches certain fields to find matches to the text that you enter in the search field. It displays all records where the text string you entered is found in any of the searched fields, which is equivalent to using an OR condition in the default fields. For example, in a keyword search of service request records, the Service Number field and the Subject field are searched. If you enter the value *1234* in the Search field in the Action bar, the records displayed include the following:

- All records where the value in the Service Number field includes the string *1234*, such as service requests number 12345 and 01234.

- All records where the text in the Subject field includes the string *1234*, such as *Customer reported a problem with product number 1234*.

Some record types do not support keyword search. For a list of the record types that support keyword search and for details about the fields that are searched for each record type in a keyword search, see Default Search Fields for Keyword Search (on page 84).

Default Search Fields for Keyword Search

You can use keyword search in several places in Oracle CRM On Demand, as follows:

- **The Search section of the Action bar.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Search section of the Action bar for your company. For more information about searching for records in the Action bar, see Searching for Records in the Action Bar (on page 85).
- **Lookup windows.** Depending on the type of search that your company administrator selects for your company, either keyword search or targeted search is used in the Lookup windows where you search for records to link to the record that you are working with. For more information about searching for records in Lookup windows, see Searching for Records in Lookup Windows (on page 101).
- **The Advanced Search page in Oracle CRM On Demand.** In the Advanced Search page, the type of search depends on the options that you select, as follows:
  - If you search multiple record types, then the search is a keyword search.
  - If you search a single record type, then the search is a targeted search.

  For more information about using advanced search, see Using Advanced Search (on page 92).

NOTE: Searches using the Quick Filter fields in List pages are always targeted searches even if keyword search is selected as the default search type for your company.

For more information about keyword search and targeted search, see About Keyword Search (on page 83) and About Targeted Search (on page 75).

All record types support targeted search, but some record types do not support keyword search. The following table lists the record types that support keyword search. For each record type, the table shows the fields that Oracle CRM On Demand searches in a keyword search.

For this record type	These fields are searched
Accounts	Account Name, Location
Appointments	Subject
Campaigns	Source Code, Campaign Name
Contacts	Last Name, First Name, Email
Custom Objects 01	Name, Quick Search 1, Quick Search 2
Custom Objects 02	Name, Quick Search 1, Quick Search 2
Custom Objects 03	Name, Quick Search 1, Quick Search 2
Events	Name, Location

For this record type	These fields are searched
Leads	Last Name, First Name
Opportunities	Opportunity Name
Products	Product Name, Product Category, Status
Service Requests	SR Number, Subject
Solutions	Solution ID, Title
Tasks	Subject
Users	Last Name, First Name, Email
Specific to Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition	
Funds	Fund Name, Status
Fund Requests	Fund Request Name, Status
Specific to Oracle CRM On Demand Partner Relationship Management Edition	
Partners	Partner Name, Location
Specific to Oracle CRM On Demand Automotive Edition	
Dealer	Name, Site
Vehicles	VIN
Specific to Oracle CRM On Demand Life Sciences Edition	
Events	Name, Location
Specific to Oracle CRM On Demand Financial Services Edition	
Households	Household Name
Portfolios	Account Number

Searching for Records in the Action Bar

You can use the Search section of the Action bar to search for records. Before creating a new account, contact, and so on, it is a good idea to determine if the record already exists. In the first field in the Search section in the Action bar, you can select the record type that you want to search. You can select All to search all record types, or you can select an individual record type. You can set the default record type for the Search section. For more information, see Setting Your Default Search Record Type (on page 743).

NOTE: Your user role and the type of search that your company uses determine which record types you can search in the Search section of the Action bar.

About the Different Types of Search

If you search a single record type, the search results are displayed in a List page, and you can then work with the list of records. You can further refine the list using the list management features of Oracle CRM On Demand, and you can save search results as a new list. For more information about managing lists of records, see Working with Lists (on page 125). If you search all record types, a Search Results page is displayed with different sections for each type of record found in the search. When you search using text-based search fields, the searches are case insensitive unless the text *case-sensitive* appears grayed out in the input field. The grayed-out text disappears when you click the field.

You can also go to the Advanced Search page, which allows you to search several record types at once and to search using date fields. Advanced search also provides better filtering capabilities. For more information, see Using Advanced Search (on page 92).

Oracle CRM On Demand supports two types of search: targeted search and keyword search. Your company administrator determines which type of search is used by default for your company, by selecting the search type on the company profile page. In general, targeted search provides better query performance. For more information about targeted search and keyword search, see About Targeted Search (on page 75) and About Keyword Search (on page 83).

For targeted searches, your administrator can specify a default value for one or more of the search fields in the Action bar. You can see the filter condition as tooltip text by resting your pointer on the search field in the Action bar, unless the field is a check box field. The tooltip text is not available for check box fields. You can change the value in the search field, but you cannot change the filter condition for a search field in the Action bar. To change the condition, you must go to the Advanced Search page.

The Search section in the Action bar supports type-ahead search in certain fields for targeted search only. For more information, see Support for Type-Ahead Search in Targeted Search (on page 87).

NOTE: For targeted search only, a Book selector might be displayed in the Search section in the Action bar. You can use the Book selector to narrow the search so that only the records belonging to a particular user book (typically referred to as a user) or custom book (typically referred to as a book) are searched. For more information, see Using the Book Selector (on page 106).

What Happens If a Search Returns Only One Record

You can specify how a record is displayed if it is the only record returned by a search. The record can be opened directly in a record Detail page, or it can be shown in a list page. This behavior is controlled by the Navigate Directly to Detail Page If Only One Record Is Returned setting, which can be specified in your user profile and at company level. For information about changing this setting, see Updating Your Personal Details (on page 734).

The following procedure describes how to search for a record in the Action bar.

To search for a record in the Action bar

1. If the Action bar is hidden, show it.

   For information about showing and hiding the Action bar, see About Showing or Hiding the Action Bar (on page 39).

2. In the Action bar, in the first field in the Search section, select a record type, or select All to search all of the record types that are available for searching.

NOTE: When you select the option to search all record types, Custom Object 01, 02, and 03 record types are included in the search, but Custom Object 04 and higher record types are not included. A search of all of the record types that are available in the search is slower than searching a single record type.

3 Depending on your setup, enter the value that you want to search for in either a single text field or in several text fields.

4 Click Go.

TIP: If a message appears indicating that your search request has timed out, you can use Advanced Search to refine your criteria further. For more information, see Using Advanced Search (on page 92). You can also find more information about optimizing searches and lists on the Training and Support Web site. To access the Training and Support Web site, click the Training and Support global link at the top of each page in Oracle CRM On Demand.

5 Click the link in the record that you want.

The Detail page for the record opens.

Support for Type-Ahead Search in Targeted Search

Type-ahead search of recently viewed records is supported for targeted search in certain fields in the Search section of the Action bar. When you enter text in a supported search field, Oracle CRM On Demand searches for that text in the same field in up to 10 of the most recently viewed records of the record type you are searching. If any of those records contain the exact text in the search field, then those records are shown in a drop-down list and you can select a record directly from the list. Type-ahead searches are case insensitive and ignore diacritical marks; for example, a search for *Velka* returns *Veľká*.

The following table lists the fields that support type-ahead search.

Record Type	Type-Ahead Search Fields
Account	Account Name Billing City Location Row Id
Accreditation	Id Name
Address	Address Name Id
Allocation	Id
Application	Id Name
Appointment	Subject
Asset	Row Id

Record Type	Type-Ahead Search Fields
Broker Profile	Broker Profile Name Id
Business Plan	Id Plan Name
Campaign	Campaign Name Id Source Code
Certification	Id Name
Claim	Id
Contact	Contact City Email First Name Last Name Row Id
Course	Name Id
Coverage	Coverage Name Id
Custom Object 01	Name Quick Search 1 Quick Search 2 Row Id
Custom Object 02	Name Quick Search 1 Quick Search 2 Row Id

Record Type	Type-Ahead Search Fields
Custom Object 03	Name Quick Search 1 Quick Search 2 Row Id
Custom Object 04 through 40	Id Name Quick Search 1 Quick Search 2
Damage	Damage Name Id
Deal Registration	Id Name
Dealer	Billing City Name Row Id Site
Event	Location Name Row Id
Exam	Id Name
Financial Account	Financial Account Id
Financial Account Holder	Financial Account Holder Name Id
Financial Account Holding	Financial Account Holdings Name Id
Financial Plan	Financial Plan Name Id

Record Type	Type-Ahead Search Fields
Financial Product	Financial Product Name Id
Financial Transaction	Transaction Id Id
Fund Request	Fund Request Name Id
Fund	Fund Name Row Id
HCP Contact Allocation	Id
Household	Household Name Row Id
Insurance Property	Id
Inventory Audit Report	Id
Inventory Period	Id
Involved Party	Id Involved Party Name
Lead	Company First Name Last Name Row Id
MDF Request	Id Request Name
Messaging Plan	Id Name
Modification Tracking	Id Object Name

Record Type	Type-Ahead Search Fields
Objective	Id Objective Name
Opportunity	Opportunity Name Row Id
Order	Id Order Number
Partner	Billing City Id Location Partner Name
Partner Program	Id Partner Program Name
Policy	Id Policy #
Policy Holder	Id Policy Holder Name
Portfolio	Row Id
Product	Part # Product Category Product Name Row Id
Product Indication	Id Indication Name
Sample Disclaimer	Id
Sample Lot	Id Lot #
Sample Request	Id Order Number

Record Type	Type-Ahead Search Fields
Sample Transaction	Id Name
Service Request	Row Id Service Number Subject
Solution	Row Id Title
Special Pricing Request	Id Request Name
Task	Row Id Subject
User	Email First Name Last Name Row Id User City
Vehicle	Row Id VIN

Using Advanced Search

You can perform an advanced search of a single record type from the Advanced link in the following locations:

- The Action bar.
- Lists of related records on a parent record, if the related information sections on your record Detail pages appear as tabs, and if the Enable Enhanced View for Tabs check box is selected on the company profile.
- Lookup windows, if targeted search is enabled for your company.

You can perform an advanced search of multiple record types from the Advanced link in the Action bar.

Your user role determines which record types you can search. The sections available in the Advanced Search page change according to whether you select a single record type or multiple record types for your search, and on the location from which you start the search.

For more information about advanced search, see the following topics:

- About Advanced Search of a Single Record Type (on page 93)
- About Advanced Search of Related Records (on page 95)
- About Advanced Search of Multiple Record Types (on page 96)

For step-by-step procedures for performing advanced searches, see the following topics:

- Performing Advanced Search of a Single Record Type (on page 97)
- Performing Advanced Search of Multiple Record Types (on page 100)

About Advanced Search of a Single Record Type

You can perform an advanced search of a single record type from the Advanced link in the following locations:

- The Action bar.
- Lists of related records on a parent record, if the related information sections on your record Detail pages appear as tabs, and if the Enable Enhanced View for Tabs check box is selected on the company profile.
- Lookup windows, if targeted search is enabled for your company.

An advanced search of a single record type is similar to a targeted search in the Search section of the Action bar. You can search using multiple fields on the record type. However, an advanced search also allows you to do the following:

- Specify whether the search is case sensitive or case insensitive.
- Select the fields you want to search. For more information, see the About the Search Fields section of this topic.
- Enter the conditions, filter values, and operators (AND, OR) that define the filter.

  NOTE: In an advanced search of a single record type, you do not use the equal sign (=) to search for an exact match. Instead, you use the Equal to condition or the Equals any condition to search for exact matches.

- Specify which fields to display in the search results. This feature is available only in searches that you perform from the Advanced link in the Action bar.
- Specify the initial sort order for the search results.

About the Search Fields

When you perform an advanced search of a single record type from the Advanced link in the Action bar or the Advanced link in a Lookup window, your user role determines which record types you can search and which fields on each record type you can search, as follows:

- If your company administrator does not make any search fields available in the search layout that is assigned to your user role for a record type, then you cannot specify any search criteria for an advanced search of that record type. Running an advanced search without any search criteria returns all of the records of that record type that your user role and access settings allow you to see.
- If the All Fields in Search and Lists privilege is enabled on your user role, then you can search all of the search fields that your company administrator makes available in the search layout that is assigned to your user role for the record type.

  NOTE: It is recommended that company administrators do not enable the All Fields in Search and Lists privilege for most user roles. When the privilege is not enabled, fields that your company does not use are not visible in search and list pages. This reduces clutter and makes it easier for users to see the fields that they are most interested in.

- If the All Fields in Search and Lists privilege is not enabled on your user role, then you can search a field only if it meets both of the following criteria:
  - The field is an available search field in the search layout that is assigned to your user role for the record type.
  - The field is displayed on the Detail page layout that is assigned to your user role for that record type. If dynamic page layouts are defined for your role, then the field must be displayed on at least one of the dynamic page layouts.

NOTE: *Dynamic 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.

For information about how Oracle CRM On Demand determines which fields you can search when you perform an advanced search from the Advanced link in a list of related records, see About Advanced Search of Related Records (on page 95).

About the Search Results

The fields that are displayed in the records that are returned by an advanced search of a single record type are determined by the location from which you start the search, and on your user role, as follows:

- **Searches from the Advanced link in the Action bar.** You can select the fields that you want to display as columns in the list of records that is returned by the search. Your user role determines which fields you can select to display, as follows:
  - If the All Fields in Search and Lists privilege is enabled for your user role, then you can select any field to display as a column in the list of records that is returned by the search.
  - If the All Fields in Search and Lists privilege is not enabled for your user role, then you can select a field to display as a column in the list of records that is returned by the search only if the field is displayed on the Detail page layout that is assigned to your user role for the record type. If dynamic page layouts are defined for your role, then the field must be displayed on at least one of the dynamic page layouts for the record type.

  The search results appear in a List page. If there are too many records in the list, then you can filter or refine the list in the List page. For information about filtering and refining lists in List pages, see the following topics:
  - Filtering Lists (on page 136)
  - Refining Lists Within List Pages (on page 137)

  For more information about managing lists of records, see Working with Lists (on page 125).
- **Searches from the Advanced link in a list of related records.** The search results appear in the page where you clicked the Advanced link. The layout of the related information section on the parent record Detail page determines which fields are displayed as columns in the list of records that is returned.
- **Searches from the Advanced link in a Lookup window.** The search results appear in the Lookup window, and the layout of the Lookup window determines which fields are displayed as columns in the list of records. In most cases, the search layout that is assigned to your user role for the record type determines the layout of the Lookup window. However, there are some preconfigured Lookup windows that are not affected by the search layouts for user roles.

About the Sort Order for Search Results

Lists with no specified sort field are automatically sorted on the displayed column that provides the most efficient performance. Therefore, it is recommended that you do not specify a sort field for searches. In the standard application, a sort field is automatically selected in the Advanced Search page for a single record type, but you can clear the sort field. Your administrator can set up the search layout for a record type for your user role so that a sort field is not automatically selected. For information about setting up search layouts, see Managing Search Layouts (on page 1296).

You can optionally specify the initial sort order for the list of records that is returned by an advanced search of a single record type. You can select up to three sort fields. For example, for a list of contacts, you might choose to sort the list first by Last Name, then by First Name, and then by Department. For each of the three sort fields, you can specify whether the records are to be sorted in ascending order or in descending order.

If you specify the sort order, then as a best practice use the most restrictive available field as the first sort field, particularly if the search is for a record type that has a large number of records. For example, a search on the Email field for the Contact record type is more efficient if the results are also sorted on the Email field rather than another field such as the Contact Last Name field. If you start an advanced search from the Action bar, then you can add fields to the search results and use those fields as sort fields.

After you select the first sort field, only the sort fields that are stored directly on the same record as the first sort field are available for you to select as the second and third sort fields. For example, when searching for contacts, you might select the First Name field on the contact as the first sort field. In that case, only the remaining sort fields that are stored directly on the contact record are available for you to select as the second and third sort fields. Fields that are stored on other records, such as the Account field, which is stored on the account record, are not available.

NOTE: For searches from the Advanced link in Lookup windows, only the fields that are displayed in the Lookup window are available for you to select as the sort fields in the advanced search.

What Happens If a Search from the Action Bar Returns Only One Record?

You can specify how a record is displayed if it is the only record returned by a search. The record can be opened directly in a record Detail page, or it can be shown in a list page. This behavior is controlled by the Navigate Directly to Detail Page If Only One Record Is Returned setting, which can be specified in your user profile and at company level. This setting applies to advanced searches of single record types that you perform from the Advanced link in the Action bar only, as well as to searches that you perform directly in the Action bar. It does not apply to searches that you perform from the Advanced link in a list of related records, or to searches that you perform from the Advanced link in Lookup windows, or to searches of multiple record types. For information about changing the Navigate Directly to Detail Page If Only One Record Is Returned setting, see Updating Your Personal Details (on page 734).

For step-by-step instructions for performing advanced search of a single record type, see Performing Advanced Search of a Single Record Type (on page 97).

About Advanced Search of Related Records

If the related information sections on your record Detail pages appear as tabs, and if the Enable Enhanced View for Tabs check box is selected on the company profile, then you can perform advanced searches to refine lists of related records. As an example, you can perform an advanced search of the contact records that are linked to a parent account record. You can start the search from the Advanced link in the list, either directly in the related information section on the parent record Detail page, or in the List page that opens when you click the Show Full List link in the related information section.

An advanced search of related records is similar to an advanced search of a single record type that you perform by clicking the Advanced link in the Action bar, as described in Performing Advanced Search of a Single Record Type (on page 97). However, depending on how your administrator sets up your user role and search layouts, some of the search fields that are available in an advanced search of a record type from the Action bar might not be available in an advanced search of related records of the same record type. In addition, you cannot choose the fields to display as columns in the results of a search for related records. The search results display the same fields that are displayed in the related information section on the parent record Detail page.

Oracle CRM On Demand uses the following features to determine which fields are available for searching in an advanced search of related records of a given record type:

- **The setting for the All Fields in Search and Lists privilege in your role.**
- **The layout of the related information section in the parent record Detail page layout.** For example, if you search the contacts that are linked to a parent account record, then the Contacts related information layout that is used in the Account Detail page layout for your role is considered.
- **The Detail page layout for the record type for your role**. For example, if you search the contacts that are linked to a parent account record, then the Detail page layout for the Contact record type for your role is considered.
- **The search layout for the record type for your role.** For example, if you search the contacts that are linked to a parent account record, then the search layout for the Contact record type for your role is considered. In the search layout, the following can be considered, depending on the circumstances:
  - The set of available search fields.

- The following check box: Restrict Search to Fields Selected in Related Information Layout. The setting in this check box is not considered if the field is displayed in the list of related records where you perform the search. However, in certain cases where a field is not displayed in the 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.

The following table shows how the privilege and the layouts are used to determine whether a field is available for searching related records. The final column on the right shows the outcome in each circumstance.

All Fields in Search and Lists Privilege	Field is Displayed in the Related Information Section?	Field is Displayed on the Detail Page?	Field is an Available Search Field in the Search Layout?	Restrict Search to Fields Selected in Related Information Layout Check Box	Field is Available for Searching Related Records?
Enabled	Yes	Not applicable	Yes	Not applicable	Yes
Enabled	Yes	Not applicable	No	Not applicable	No
Enabled	No	Not applicable	Yes	Selected	No
Enabled	No	Not applicable	Yes	Not selected	Yes
Enabled	No	Not applicable	No	Not applicable	No
Disabled	Yes	Yes	Yes	Not applicable	Yes
Disabled	Yes	Yes	No	Not applicable	No
Disabled	Yes	No	Not applicable	Not applicable	No
Disabled	No	Yes	Yes	Selected	No
Disabled	No	Yes	Yes	Not selected	Yes
Disabled	No	Yes	No	Not applicable	No
Disabled	No	No	Not applicable	Not applicable	No

About Advanced Search of Multiple Record Types

An advanced search of multiple record types is a keyword search. You can search some or all of the record types that support keyword search. When you use advanced search to search multiple record types, a Search Results page is displayed with different sections for each type of record found in the search.

NOTE: When you select the All Record Types option in the list of record types to search, only the record types that support keyword search are included in the search. To search record types that do not support keyword search, you must search one record type at a time.

For more information about how a keyword search works, see About Keyword Search (on page 83). For step-by-step instructions for performing advanced search of multiple record types, see Performing Advanced Search of Multiple Record Types (on page 100).

Performing Advanced Search of a Single Record Type

This topic describes how to perform the following tasks:

- Start an advanced search of a single record type from the following locations:
  - The Action bar
  - A Lookup window
  - A list of related records
- Complete an advanced search.

The following procedure describes how to start an advanced search of a single record type from the Action bar.

To start an advanced search of a single record type from the Action bar

1. If the Action bar is hidden, show it. For information about showing and hiding the Action bar, see About Showing or Hiding the Action Bar (on page 39).
2. In the Action bar, in the Search section, click Advanced.
3. In the Advanced Search page, do the following:
   a. Select the Following Record Types radio button.
   b. Select the check box for the record type that you want to search.
   c. Make sure that the check boxes for all other record types are not selected.
4. In the Search In section, select one of the following options:
   - Record Set
   - Book

   NOTE: The Search In section is not displayed for record types that do not have owners, for example, the Product record type and the User record type. The Book option in the Search In section is available only if the Book feature is enabled for your company.

5. In the Search In section, if you select the Record Set option, then select one of the following to specify the set of records you want to search:
   - **All records I can see.** Includes records that you have at least View access to, as defined by your reporting hierarchy, the access level for your role, and the access level for shared records.

     NOTE: The Manager Visibility Enabled option on the company profile and the Can Read All Records setting on your user role are considered when you select this option. If the Manager Visibility Enabled option on the company profile is not selected, then the set of records that is searched when you choose the All Records I Can See option is the same set of records that is searched when you select the All Records Where I Am on the Team option, unless the Can Read All Records setting on your user role is selected for the relevant record type.

   - **All records I own.**
   - **All records where I am on the team.** Includes only records in the filtered list where one of the following applies:
     - You own the records.
     - The records are shared with you by the owner through the Team feature.
     - The records are shared with you through the group assignment feature for accounts, activities, contacts, households, opportunities, and portfolios.
   - **All records I or my subordinates own.** Includes records that you or any of your subordinates own. The Manager Visibility Enabled option on the company profile is not considered when you select this option.

- **All records where I or my subordinates are on the team.** Includes records where you or any of your subordinates are on the team, if Manager Visibility is enabled on the company profile. The Manager Visibility Enabled option on the company profile is not considered when you select this option.
- **My Default Book**. Your default setting for the Book selector, as defined by your company administrator.

6. In the Search In section, if you select the Book option, then select a book, user, or delegate in the Book selector.

   For more information, see Using the Book Selector (on page 106).

The following procedure describes how to start an advanced search of a single record type from a Lookup window.

To start an advanced search of a single record type from a Lookup Window

- In the Lookup window, click Advanced.

The following procedure describes how to start an advanced search of a single record type from a list of related records.

To start an advanced search of a single record type from a list of related records

1. In the parent record Detail page, scroll to the related information section.
2. In the related information section, click Advanced.

The following procedure describes how to complete an advanced search of a single record type. This procedure is applicable for advanced searches that you start from the Advanced link in Lookup windows or the Advanced link in lists of related records, as well as to advanced searches that you start from the Advanced link in the Action bar.

To complete an advanced search of a single record type

1. In the Advanced Search page, in the Choose Case Sensitivity section, select the Case Insensitive check box if required.

   If this check box is selected, then certain fields become case-insensitive for the search. These fields are shown in blue text in the Enter Search Criteria section.

2. In the Enter Search Criteria section do the following:

   a. Select a field from the Field list.

      If you started the search from the Action bar, then the fields are prepopulated with the targeted search fields for the record type. If you started the search from a Lookup window or from a list of related records, and if you already selected a search field in the Lookup window or list of related records, then the first criteria field is prepopulated with your selected search field.

      Certain fields are optimized to improve performance during searches and when sorting lists. These optimized fields are shown in green text in the list of search fields. If your search criteria include a field that is not optimized for searching, your search might be slower. You can filter against a maximum of 10 fields.

      NOTE: The fields that are shown in purple text in the Enter Search Criteria section are always case-insensitive, regardless of the setting of the Case Insensitive check box. These fields are not optimized for fast searches.

   b. Enter the conditions, filter values, and operators (AND, OR) that define the filter.

      For information about using filter conditions, see About Filter Conditions (on page 77).

      CAUTION: When entering Filter Values, check to make sure you follow the rules described in About Filter Values (on page 81). Otherwise, you might not find the correct records.

   Examples

Accounts: If you want to create a filtered list of accounts in Canada with annual revenue over $100,000,000.00, complete the form as follows:

Field	Condition	Value(s)	
Annual Revenue	Greater than	100000000	AND
Country	Equal to	Canada	

Leads: If you want to create a filtered list of leads with potential revenue over $100,000.00 and ratings of A or B, complete the form as follows:

Field	Condition	Value(s)	
Potential Revenue	Greater than	100000	AND
Rating	Less than	C	

3. (Searches from the Action bar only) In the Display Columns section, choose the fields to display as columns in the search results by moving fields from the Available Fields list to the Selected Fields list. Use the up and down arrows to change the order of the selected fields.

   TIP: After the list of records is returned, you can quickly change the order of the columns in the list by dragging the column headings to a new location and dropping them. You can optionally save the list after you change the order of the columns.

4. (Optional) In the Sort Order section, specify the initial sort field or fields that you want, and the sort order, as follows:

   - If you do not want to specify a sort field, and if a sort field is already selected, then clear the sort field.

     Lists with no specified sort field are automatically sorted on the displayed column that provides the most efficient performance. Therefore, it is recommended that you do not specify a sort field for searches. For more information about specifying the sort order for search results, see About Advanced Search of a Single Record Type (on page 93).

   - If you want to specify one or more sort fields, then do the following:

   a. In the Sort by drop-down list, select the first sort field, and then click Ascending or Descending to specify the sort order.

   b. Select a second sort field, and a third, as needed, and then specify the sort order for these fields.

   Certain fields are optimized to improve performance during searches and when sorting lists. These optimized fields are shown in green text in the list of sort fields. If you select a field that is not optimized as a sort field, then your search could be slower.

   NOTE: You cannot select a field of type check box as the sort field in this step. However, after the list is created, you can click the column header to sort the fields based on the values in the check box.

5. Click Go.

TIP: If a message indicates that your search request has timed out, then refine your search criteria further, and try again. You can also find more information about optimizing searches and lists on the Training and Support Web site. To access the Training and Support Web site, click the Training and Support global link at the top of each page in Oracle CRM On Demand.

Related Topics

For more information about advanced search of a single record type, see the following topic:

- About Advanced Search of a Single Record Type (on page 93)

Performing Advanced Search of Multiple Record Types

The following procedure describes how to perform an advanced search of multiple record types.

To perform an advanced search of multiple record types

1. If the Action bar is hidden, show it. For information about showing and hiding the Action bar, see About Showing or Hiding the Action Bar (on page 39).
2. In the Action bar, in the Search section, click Advanced.
3. In the Advanced Search page, select the option you want, as follows:
   - Select the All Record Types option to search all of the record types that support keyword search. This query is slower.
   - Select the Following Record Types option, and then select the check box for each of the record types that you want to search.
4. In the Keywords field, enter the value that you want to search for or leave the Keywords field blank to search only on the basis of the dates that you provide.

   NOTE: In the Keywords field, it is not necessary to use a wildcard (*) for a partial word because a wildcard is automatically added to the beginning and end of the user input. The use of the equal sign (=) to search for an exact match is not supported.

5. If required, enter the date range (use four digits for the year, such as 2010):
   - For Appointments, the date applies to Start Time (Date).
   - For Tasks, the date applies to Due Date.
   - For Opportunities, the date applies to Close Date.
   - For all other record types, the date applies to the Created date.
6. Click Go.

   The results appear for each record type.

Related Topics

For more information about advanced search of a multiple record types, see the following topic:

- About Advanced Search of Multiple Record Types (on page 96)

Finding Records in List Pages

Use the following procedure to find records in a list page.

To find a record in a list page

1. Click the tab for the type of record that you want to find.
2. On the record Homepage, select the filtered list that would include the record that you are trying to find.

   You can also go to the required list from the Favorite Lists section in the Action bar if the list is available there.
3. On the List page, you can do the following:
   - Use an Alpha Search to find the record.

     NOTE: If your user language is Korean, Japanese, Simplified Chinese, or Traditional Chinese, then the Alpha Search controls are not available.

   - Use the Quick Filter fields to find the record.

- Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.

For more information about using Alpha Search and the Quick Filter fields, see Filtering Lists (on page 136).

4 Click the link in the record that you want to work on.

The Detail page for that record opens.

Searching for Records in Lookup Windows

You use Lookup windows to search for and select records that you want to associate with the record you are working with. You usually open a Lookup window by clicking the Lookup icon next to a field. Depending on the record types that you are working with, you can also open Lookup windows by clicking Add in certain related information sections of Record Detail pages. Also, if smart associations are enabled, then Lookup windows open automatically in certain cases. For more information about smart associations, see About Smart Associations and the Auto-Resolve Functionality (on page 106).

The appearance and behavior of Lookup windows depend on the following:

- **The type of search that is enabled for your company.** Depending on the type of search your company administrator selects for your company, either keyword search or targeted search, Lookup windows are affected as follows:
  - **If keyword search is enabled.** A single text field is displayed in the Lookup window. You can enter search criteria and press Enter, or click Go to refine the list of records.

    NOTE: Some record types do not support keyword search. For such record types, if keyword search is the default search type for the company, then you can perform a targeted search in the Lookup window.

  - **If targeted search is enabled.** Quick Filter search fields are displayed in the Lookup window. You can enter search criteria, and press Enter, or click Go to refine the list of records. An Advanced link is also displayed. This link opens the Advanced Search page. For more information about advanced search, see About Advanced Search of a Single Record Type (on page 93) and Performing Advanced Search of a Single Record Type (on page 97). If your company uses books, then a Book selector is also displayed. The Book selector enables you to narrow the search to the records belonging to a particular user or book. For more information, see Using the Book Selector (on page 106).

  Targeted search is the recommended search type. For more information about targeted search and keyword search, see About Targeted Search (on page 75) and About Keyword Search (on page 83).

- **The type of association in the Lookup window.** Lookup windows are either single-association windows, where you can select one record to link to the record that you are working with, or multi-association Lookup windows, where you can select multiple records to link to the record that you are working with. For example, you can link contacts to a task in the following ways:
  - In the Task Detail page, if you want to add a primary contact for the task, then you click the lookup icon in the Primary Contact field. In this case, a single-association Lookup window opens, and you can select a single contact as the primary contact for the task.
  - You can link multiple contacts to a task in the Contacts related information section of the Task Detail page. In this case, you click Add in the Contacts related information section. A multi-association Lookup window opens, and you can select one or more contacts to link to the task.
  - If your company administrator adds the Contacts field to the Task Detail page, then you can link multiple contacts to the task by clicking the lookup icon in that field. A multi-association Lookup window opens, and you can select multiple contacts. The contacts that you select are listed in the Contacts field and are also listed in the Contacts related information section on the Task Detail page.
- **The search layouts that your company administrator sets up for the record types.** For example, when you use a Lookup window to find an account record that you want to link to a contact record, the appearance of the Lookup window depends on the search layout for the Account record type for your user role.

- **The Record-Type Lists in Lookup Windows setting on the company profile.** This setting determines whether you can restrict a search in a Lookup window to a predefined list of records. The setting has the value Enabled by default, allowing you to restrict searches in Lookup windows. For more information, see the Lists for Restricting Searches section of this topic.

Lookup Window Features Controlled by Search Layouts

The search layouts that your company administrator sets up and assigns to user roles determine the behavior of Lookup windows, as described in the following sections.

Quick Filter Fields

If targeted search is enabled for your company, then the search layout for the record type for your user role determines how you can use the Quick Filter fields in the Lookup window, as follows:

- If your company administrator does not make any search fields available in the search layout, then you cannot use the Quick Filter.
- Generally, you can filter the list of records shown in the Lookup window on any of the fields that your company administrator makes available as search fields in the search layout.

  However, if the search criteria for the list of records shown in the Lookup window include a field that is not one of the search fields defined in the search layout, then you cannot use the Quick Filter. For example, if you are searching for an account record, and your company setup allows you to restrict your search to a predefined list of records, then you might decide to search the All Customer Accounts list in the Lookup window. However, the search field for the All Customer Accounts list is the Account Type field. If the Account Type field is not available as a search field for your role, then you cannot filter the list of records in the Lookup window. For more information about selecting predefined lists of records in Lookup windows, see the Lists for Restricting Searches section of this topic.
- In the standard application, the default search field in the Quick Filter is preconfigured for each Lookup window. However, if your administrator selects the First Targeted Search Field as Default Search in Lookups check box in the search layout for the record type for your user role, then 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, unless you enter a value in the field on the record Edit or Detail page before you open the Lookup window; in that case, the default search field that is preconfigured for the Lookup window is used.
- An additional check box, Configure Lookup Window with Division as the Default Search Field, is available in the search layout for the Product record type only. The setting in this check box overrides the setting in the First Targeted Search Field as Default Search in Lookups check box. The following table shows how the settings in these check boxes determine the default search field for the Quick Filter in the Lookup window for the Product record type.

Configure Lookup Window with Division as the Default Search Field	First Targeted Search Field as Default Search in Lookups	Default Search Field in Quick Filter	Notes
Selected	Not selected Or Selected	Division	If a primary division is specified on your user record, then the filter value field in the Quick Filter is populated with your primary division. If a primary division is not specified for you, then it is recommended that you select a division from the Product Lookup window to search for products within a specific division. If you do not select a

Configure Lookup Window with Division as the Default Search Field	First Targeted Search Field as Default Search in Lookups	Default Search Field in Quick Filter	Notes
			division, then when you click Go to complete the search, Oracle CRM On Demand displays all products in the search results.
Not selected	Not selected	Product Name	The Division field is not available in the Quick Filter unless your administrator chooses it as a search field in the product search layout.
Not selected	Selected	The first field in the list of targeted search fields in the search layout.	The Division field is not available in the Quick Filter unless your administrator chooses it as a search field in the product search layout.

For more information about how the search layout settings affect the Lookup window for the Product record type, see Considerations When Creating Product Search Layouts (on page 1301).

Prepopulated Lists of Records

If your company administrator selects the Show Search Results When Lookup Window Opens option on the search layout for a record type, then the Lookup window is populated with a list of records when the window opens. If this option is not enabled, then no records are displayed when the Lookup window opens, and you must specify the search criteria to find the record you want.

Context-Sensitive Lists

If the Record-Type Lists in Lookup Windows setting on the company profile has the value Enabled, then your company administrator can configure the search layout for a record type to specify whether any available context-sensitive lists appear before the system lists and custom lists in the *record type* List field in the upper-left corner of Lookup windows for the record type. *Context-sensitive lists* are predefined sets of records that are most likely to include the record that you want. For more information about the *record type* List field in Lookup windows, see the Lists for Restricting Searches section of this topic.

Displayed Columns

In most cases, the search layout determines which fields display as columns in the list of records in the Lookup window. However, there are some preconfigured Lookup windows that are not affected by the search layout.

Lists for Restricting Searches

Depending on your company setup, you might be able to restrict a search in a Lookup window to a predefined list of records. Also, depending on the context in which you are searching for a record, you might be able to restrict your search to a context-sensitive list. The ability to restrict a search to a list of records is determined by the Record-Type Lists in Lookup Windows setting on the company profile. If the Record-Type Lists in Lookup Windows setting is Enabled on the company profile, then a set of predefined lists that you can use to restrict your search is available in the *record type* List field in all Lookup windows for top-level record types, where *record type* is the name of the type of record that you are searching for. The set of predefined lists that is available to you in the *record type* List field can include standard lists and custom lists, and it also includes any available context-sensitive lists.

By default, all of the standard lists and custom lists that are available in the List pages and in the Homepage for a top-level record type are also available in the Lookup windows for that record type. However, your company administrator can determine which lists are available for your user role, and you can choose which of the available lists appear in your set of lists. For more information, see Changing Sets of Lists for Record Types (on page 142).

NOTE: If the *record type* List field is available in Lookup windows, then the first list in the set of lists in the *record type* List field is active by default when a Lookup window opens. If some context-sensitive lists are available in the Lookup window, and the search layout for your user role specifies that the context-sensitive lists appear at the top of the set of lists in the *record type* List field in the Lookup window, then the first available context-sensitive list is active by default when the Lookup window opens. If the *record type* List field is not available in Lookup windows, then the initial search for a record of a given record type in a Lookup window is performed on all records of that record type that you can access.

The list that is active in the Lookup window determines the filter for the set of records that is searched in the Lookup window, even if the records are not displayed in the Lookup window. Any additional filters that you apply in the Lookup window are applied to the set of records in the selected list. For example, assume that you have the following setup:

- The Record-Type Lists in Lookup Windows setting on the company profile has the value Enabled so that the set of predefined lists is available in the Lookup windows.
- You have a custom list called *All My Contacts in California* that shows all contacts where the value in the State field is *California*.
- The *All My Contacts in California* list is the first list in your set of lists for the record type.
- In the search layout for the Contact record type for your role, your company administrator specified that the Lookup window is not populated when it opens, and that context-sensitive lists are not shown at the top of the set of lists.

In this case, when you open a Lookup window for the Contact record type, the *All My Contacts in California* list is active, even though the records are not displayed in the Lookup window. If you enter *Jane* in the First Name filter field and click Go, then all contacts where the value in the State field is *California* and the value in the First Name field is *Jane* are returned in the Lookup window. If you decide to search a different list of records for contacts whose first name is Jane, then you can select that list in the record type List field, and click Go.

NOTE: When you open a Lookup window to search for a contact to link to a record of another record type, the Favorite Contacts list is available in the *record type* List field. You can select a favorite contact to link that contact to the parent record.

About Context-Sensitive Lists

The following are some of the context-sensitive lists that might be available to you in the Lookup window:

- In the Task Edit page, if you select a valid value in the Account field and you open the Lookup window for the Primary Contact field, then the following lists might be available as context-sensitive lists:
  - The Contacts with Related Account as Primary list. This list includes all of the contacts for which the selected account is the primary account.

    NOTE: In releases earlier than Release 25, the *Contacts with Related Account as Primary* list was named *Contacts for Related Account*.

  - The All Contacts for Related Account list. This list includes all of the contacts that are linked to the selected account, irrespective of whether the selected account is the primary account for the contact.

    NOTE: The All Contacts for Related Account list is available in all Lookup windows where the Contacts with Related Account as Primary list is available, except in the case of multi-association Lookup windows. If the Lookup window is a multi-association window, then the Contacts with Related Account as Primary list is available, but the All Contacts for Related Account list is not available.

- In the Task Edit page, if you select a valid value in the Contact field and you open the Lookup window for the Service Request field, then the Service Requests for Related Contact list might be available as a context-sensitive list.
- In the Task Edit page, if you select a valid value in the Opportunity field and you open the Lookup window for the Custom Object 01 field, then the Custom Objects 01 with Related Opportunity as Primary list might be available as a context-sensitive list.
- In the Service Request Edit page, if you select a valid value in the Contact field and you open the Lookup window for the Financial Account field, then the Financial Accounts for Related Contact list might be available as a context-sensitive list.
- In the Lead Edit page, if you select a valid value in the Account field and you open the Lookup window for the Financial Account field, then the Financial Accounts for Related Account list might be available as a context-sensitive list.

Searching for and Selecting a Record in a Lookup Window

This procedure describes how to search for and select a record.

NOTE: In Oracle CRM On Demand Partner Relationship Management Edition, when a user in the partner organization searches for a user in a Lookup window, users in the brand owner company are never returned by the search unless the View Brand Owner Users in Lookup privilege is enabled in the role of the user who performs the search. If the View Brand Owner Users in Lookup privilege is enabled in the role of the user in the partner organization, then users in the brand owner company can be returned by a search in a Lookup window and can be selected by the user in the partner organization. Users who have the Manage PRM Access privilege in their role can enable the View Brand Owner Users in Lookup privilege for other roles.

To search for and select a record in a Lookup window

1. In the Lookup window, search for the record or records that you want in some or all of the following ways, depending on the record type and on how your company administrator sets up the search features:
   - In the Lookup window, in the *record type* List field, select a predefined list to restrict your search to the records in that list, and then click Go.
   - Use the Quick Filter fields to filter the list.

     NOTE: Each time that you apply a filter to a list of records in the Lookup window, only the records that are currently in the list are searched. So, if you apply a second filter to a list that you already filtered, then only the records that were returned by the first filter are searched when you apply the second filter. If you want to clear all of the filters, then click the Clear button. When you click Clear, all of the filters you applied to the list that you originally selected are removed from the list, and the Quick Filter fields are reset to blank. You can then apply new filters to the list, as necessary.

   - If targeted search is enabled, click the Advanced link to perform an advanced search. For more information, see About Advanced Search of a Single Record Type (on page 93) and Performing Advanced Search of a Single Record Type (on page 97).
   - Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.

   NOTE: For some record types, you can also click New to create a new record. The new record will be added to the list.

2. Select the records that you want, as follows:
   - If the Lookup window is a single-association window, click Select for the record that you require.
   - If the Lookup window is a multiassociation window, click Select for each of the records that you require. The records are moved from the Available Records list to the Selected Records list. When you have selected all of the records that you want, click OK.

NOTE: In the Lookup window, you can click Clear Current Value to remove already-selected information and leave the field blank. However, the Clear Current Value button is not available if smart associations are turned on. For more information about smart associations, see About Smart Associations and the Auto-Resolve Functionality (on page 106).

About Smart Associations and the Auto-Resolve Functionality

Smart associations in Oracle CRM On Demand are automatic searches that make it easier for you to associate records of different record types, such as account, contact, opportunity, activity, and so on with each other. The smart associations functionality is controlled by the Auto-Resolve Enabled check box on search layouts, for more information, see Managing Search Layouts (on page 1296).

When smart associations are enabled, you can type part or all of the name of the record that you want to associate with the main record in the appropriate field, and then allow Oracle CRM On Demand to automatically resolve the association. When you try to save your changes, Oracle CRM On Demand searches for a match for the name you entered. If Oracle CRM On Demand finds a unique match, then the matching record is used, and your changes are saved. If Oracle CRM On Demand finds no match or finds multiple potential matches, then you are presented with a Lookup window where you can perform additional searches, and then select the appropriate record.

For example, when you want to associate an account with a task, you can type the name of an account in the Account name field on the Task Detail page. When you try to save your changes, Oracle CRM On Demand searches for matching accounts. If Oracle CRM On Demand finds a unique matching account, then that account is used. If Oracle CRM On Demand finds no matching account or finds multiple potentially matching accounts, then a Lookup window opens. In the Lookup window, you can perform additional searches, and select the appropriate account. For more information about using Lookup windows, see Searching for Records in Lookup Windows (on page 101).

If smart associations are not enabled, or you do not know the name of the record that you want to associate with the record you are working with, then you must click the Lookup icon next to a field to open the Lookup window. In the Lookup window, you can search for the record that you want to associate with the record that you are working with.

NOTE: Smart associations are applicable where single-association Lookup windows are available. Where multiassociation Lookup windows are available, smart associations are not applicable.

Using the Book Selector

The Book selector allows you to narrow your searches to a particular user book or custom book. In the context of the Book selector, custom books are referred to as books.

Where Is the Book Selector Displayed?

The Book selector is displayed in:

- The Search section in the Action bar
- The Lookup window
- The Search In section in advanced searches
- List pages
- The Analytics tab

The Book selector is displayed only if both of the following conditions apply:

- The Display Book Selector option is enabled in your company profile.
- The record type is supported for books.

  For information about which record types are supported for books, see Book Management (on page 1421).

With the Book Selector You Can Restrict Your Search

The Book selector allows you to restrict your search to a specific user or book. The Book selector therefore displays a hierarchy of users and a hierarchy of books, with All at the top of the hierarchy. Most employees see only a hierarchy of users, because the custom book feature is not enabled by default.

For reports and dashboards, the book hierarchy is displayed only if Full Visibility is selected in the Historical Subject Areas setting in the company profile.

Levels in a Book Hierarchy

When you use the Book selector to restrict a search for records, or to restrict the data in a report, you can view, expand, and collapse certain levels of the custom book hierarchy in the Book selector, as follows:

- In the standard application, the Book selector shows the highest-level book (or books) to which you have access in the hierarchy, and you can expand and collapse that level of the hierarchy and each of the levels below it. The levels of the hierarchy above the level to which you have access are not shown.
- If your administrator selects the Display Parent Book Hierarchy in Book Selector check box on the company profile, then the following happens:
  - The highest-level book (or books) to which you have access is shown. You can expand and collapse that level of the hierarchy and each of the levels below it.
  - At each level of the hierarchy above the level to which you have access, the parent of the subbook below is shown. If the Can Read All Records check box for the Book record type is selected in your user role, then you can expand and collapse all of the levels of the hierarchy that are shown, otherwise, you can expand and collapse only the hierarchy levels to which you have access, and the levels below.

    The names of the books to which you have access are shown in the default text color in the book selector. The names of any books that are shown but to which you do not have access are shown in red.

NOTE: When you use the Book selector to select a book for reasons other than restricting a search or restricting data in a report, all of the custom books, including the books to which you do not have access, are shown in the Book selector, and the names of all the books are shown in the default text color. For example, when you use the Book selector to select a book to assign to a record, all of the books are shown in the Book selector.

When you expand a level in the book hierarchy, and if there are more than 500 books at that level of the hierarchy, then the books are grouped in sets of 500. The label for a set of books shows the name of the first book and the name of the last book in the set. You can expand the appropriate set of books to find the book that you want. The final set of books can contain fewer than 500 books.

Default Book in the Book Selector

The settings on your user record determine which book you see by default in the Book selector. For information about the default books in the Book selector, see the descriptions of the following fields in Updating Your Personal Details (on page 734):

- Default Book
- Default Book for Analytics
- Preserve Default Book

Considerations That Apply When You Select a Book in the Book Selector

When selecting a book in the Book selector, the following considerations apply:

- When you select a book that has subbooks, the parent book and all of its subbooks are selected.

  CAUTION: For optimal performance, include subbooks only when absolutely necessary.
- Each user has a set of default books. If you select All, all of the books applicable to you and your subordinates (if any) are selected.
- Within the User hierarchy you can choose users that have delegated their access to you or users in your organization.

- After you select a book or user, and click OK, the name of the book or user is displayed in the Book selector. The plus sign (+) indicates that children in the hierarchy are also selected.
- You can use the Include Sub-Items check box to control whether subbooks or subordinates are included in the respective hierarchy.

NOTE: The books that are automatically created when active partner records are created appear in the Book selector for the Partner record type only.

Finding Records Using Enhanced Keyword Search

In addition to searching for records in the Search section of the action bar, you can also use the enhanced keyword search to locate records, if your company administrator has set up the Enhanced Keyword Search section in the Action bar or in the global header. You can use the enhanced keyword search for the following record types:

- Accounts
- Appointments
- Contacts
- Opportunities
- Tasks

When you enter a search string, the enhanced keyword search feature tries to find that string in several key fields for all records to which you have visibility, for the record type that you are searching. For example, if you are searching accounts, then the enhanced keyword search searches the Account Name, Location and Billing City fields to locate the required accounts. For example, consider that you have three account records, the first with the Location field set to San Francisco, and the second and third with the Location field set to San Mateo. If you enter San as the search string, then the enhanced keyword search returns all three account records. However, if you search for San Mateo, then the search returns only the second and third account records. For more information on enhanced keyword search, see About Enhanced Keyword Search.

If your company administrator selects the Configure Enhanced Keyword Search with Selected Search Results Fields option for the search layout that is assigned to your role for a record type, then an enhanced search for records of that type displays the set of results fields defined in the search layout. Otherwise, the key fields for the record type are displayed during an enhanced search. For example, if the administrator configures only the First Name, Last Name, and Account fields in the Search Layout Wizard for a contact, then the search only lists these fields in the search result page when you search for contacts.

Before you begin. To complete the following procedure, your company administrator must do one of the following:

- Set up the Enhanced Keyword Search section of the Action bar.
- Set up the Enhanced Keyword Search section in a search icon in the global header if you are using the modern style interface.

To use enhanced keyword search to find records

1. Navigate to the Enhanced Keyword Search section in the Action bar or the global header as follows:
   - If your administrator has set up the Enhanced Keyword Search section in the Action bar, then navigate to that section in the Action bar. For information about showing and hiding the Action bar, see About Showing or Hiding the Action Bar (on page 39).
   - If you are using the modern style user interface and your administrator has set up the Enhanced Keyword Search in a search icon in the global header, then click the search icon and navigate to the Enhanced Keyword Search section.
2. In the Enhanced Keyword Search section, select a record type.

NOTE: Only the Account, Appointment, Contact, Opportunity, and Task record types are supported for enhanced keyword search. The record type displayed by default in the Enhanced Keyword Search section is set by the Default Search Record Type field in a user's Personal Detail page.

TIP: To see the fields that the enhanced keyword search feature searches for by record type, select a record type, then hover your mouse over the tooltip icon beside the search field.

3. Enter the string that you want to search for in the search field.
4. Click Go or Advanced Search.

   TIP: If a message appears indicating that your search request has timed out, you can use Advanced Search to refine your criteria further. For more information, see Using Advanced Search (on page 92). You can also find more information about optimizing searches and lists on the Training and Support Web site. To access the Training and Support Web site, click the Training and Support global link at the top of each page in Oracle CRM On Demand, and then click the link in the record that you want.

   - If you clicked Go, then you can click the link for the record that you want to open the Detail page for.
   - If you clicked Advanced Search, then the Advanced Search page opens with the record type that you selected in step 2. The record type is preselected on the Advanced Search Page.

     You can then complete the search parameters and criteria in the Advanced Search page. For more information on using advanced search, see Using Advanced Search (on page 92).

Related Topics

See the following topics for related information:

- About Enhanced Keyword Search (on page 109)
- Finding Records (on page 74)
- About Targeted Search (on page 75)
- About Keyword Search (on page 83)
- Searching for Records in the Action Bar (on page 85)
- Using Advanced Search (on page 92)

About Enhanced Keyword Search

In addition to targeted search and keyword search, Oracle CRM On Demand supports enhanced keyword search. Enhanced keyword search can find records containing strings that are similar to the search string entered, in addition to finding records with an exact match. This search can match records with the exact search string that you enter regardless of the string's sequence or how the string is divided using spaces or punctuation. It can match records that are based on the linguistic root of words, and it can also match words that are spelled similarly.

Generally, targeted search provides better performance than enhanced keyword search. If you know the exact string for that you want to search for, then use the targeted search that is available in the Search or Advanced Search sections in the UI, rather than the Enhanced Keyword Search section. If you are not sure of the exact string, and if you want to find records that are similar, then use enhanced keyword search.

Enhanced keyword search contains one search field that is used to search for a selected record type containing the supported fields, as shown in the following table.

Record Type	Fields Included in Enhanced Keyword Search
Account	■ Account Name ■ Location ■ Billing City
Appointment	■ Subject

Record Type	Fields Included in Enhanced Keyword Search
Contact	- Contact First Name - Contact Last Name - Email - Contact City
Opportunity	- Opportunity Name
Task	- Subject

The tooltip in the Enhanced Keyword Search section for each record type shows the fields supported for that record type. For example, if you enter *Sunnyvale* when searching Accounts, then enhanced keyword search looks for Sunnyvale in the Account Name, Location, and Billing City fields for all accounts that you can access. The search displays all records that have the search string that you entered in the supported search fields.

Characteristics of Enhanced Keyword Search

This topic describes the characteristics of enhanced keyword search.

- The search performs the following word matching:
  - Exact word matches

    Searches for records that contain the exact search string, that is, the same spelling as the string entered in the search.
  - Accumulation matches

    Searches for records that contain at least one occurrence of the search string, with the returned records ranked by a cumulative score that is determined by how many search string matches are found and how frequently they occur. For example, a search for *First National Bank of Arizona* returns the Arizona First National Bank record, with four matching string values, prior to the First National Bank record, with only three matching string values.
  - Stemming matches

    Searches for records that contain values that have the same linguistic root as the query string. For example, a search for Manufacturer returns records containing Manufacturing or Manufactured, in addition to Manufacturer. (Stemming matches are supported in English only.)
  - Fuzzy matches

    Searches for records that contain words that are spelled similarly to words in the specified search string. For example, searching for *Oracle* misspelled as *Orcale* results in finding the records that contain *Oracle.* (Fuzzy matches are supported in English only.)
- The search is case insensitive (for example, a search for *Bella* returns *Bella* or *bella)*
- The search ignores the following items:
  - Diacritical marks, for example, a search for *Velka* returns *Veľká*
  - Punctuation, including the following:
    - Apostrophe (')
    - Brackets ([ ])
    - Angle brackets (< >)
    - Braces ({ })
    - Parentheses [( )]
    - Colon (:)

- Comma (, ¸)
- Dashes (– — ―)
- Ellipsis points (… ... . . .)
- Exclamation mark (!)
- Period (.)
- Hyphen (-)
- Question mark (?)
- Quotation marks (‘ ’ “ ” ' " ")
- Semicolon (;)
- Slash (/ ⁄)

- Noise words

  In a search query, enhanced keyword search ignores noise words in English, Danish, Dutch, Finnish, French, German, Italian, Portuguese, Spanish, and Swedish. A noise word is a word that is so common that it is not useful and is ignored to save time doing searches. In English, examples of noise words include words, such as *or*, *and*, or *the*.

- Enhanced keyword search requires specialized search indexes. Data from Oracle CRM On Demand is synchronized to the search indexes over time intervals, therefore, you might find that a record that was recently added or modified is not found until a later time.
- Because enhanced keyword search is a complex search, the search performance might vary depending on the search criteria and the data quality. It is recommended that you search with a more refined search criterion, or that you use the Advanced Search in cases where you know the exact string or field for which to search.

Type-Ahead Support

Enhanced keyword search supports type-ahead search. The type-ahead search searches for records in the Recent Items lists that contain the search string in the supported fields for the specific record type that you are searching. The type-ahead search is case insensitive and ignores diacritical marks, and the match can be at the beginning of the field value, or a substring of the field value, or at the end of the field value.

Recent Items lists that are supported include the following lists:

- My Recently Viewed *record type*
- My Recently Created *record type*
- My Recently Modified *record type*

When you enter the search string, the type-ahead search opens a small Recent Items window near the Enhanced Keyword Search section. This window lists all records containing strings that match the search string characters entered, up to a maximum of 10 records. The type-ahead search matches one character at a time in bold font, as you enter the search string. The items listed in the window display the name of the record and the supported field names in parentheses [( )] after the record name. The name of the record is derived from the fields as shown in the following table.

Record Type	Fields Displayed to Derive the Record Name
Account	Account Name
Appointment	Subject

Record Type	Fields Displayed to Derive the Record Name
Contact	First Name Last Name
Opportunity	Opportunity Name
Task	Subject

If the search string matches a value in a supported field, then the values that match are in bold. For example, if the value is contained in the Location field for an Account record, then the window displays Account Name (**Location**, Billing City). For example, you might create three accounts with the settings shown in the following table.

Account Name	Location	Billing City
Account1	California	Sunnyvale
Account2	California	Sunnyvale
Account3	Sunnyside	Sunnyside

If you search for *Sunnyvale* for Accounts, the Recent Items window shows the following when you enter *S*:

Account3 (**S**unnyside, **S**unnyside)
Account2 (California, **S**unnyvale)
Account1 (California, **S**unnyvale)

When you enter *Sunnyv*, the Recent Items window shows the following:

Account2 (California, **Sunnyv**ale)
Account1 (California, **Sunnyv**ale)

The search returns the Account records in the Recently Viewed Accounts, Recently Created Accounts, and the Recently Modified Accounts lists that contain Sunnyvale in the Account Name, Location, or Billing City fields. Clicking any record that is returned in the Recent Items window opens the Detail page for that record.

Related Topics

See the following topics for related information:

- Finding Records Using Enhanced Keyword Search (on page 108)
- Finding Records (on page 74)
- About Targeted Search (on page 75)
- About Keyword Search (on page 83)
- Searching for Records in the Action Bar (on page 85)
- Using Advanced Search (on page 92)

Copying Records

For most record types, you can create a new record by copying an existing record. When you copy a record, the values in certain fields in the record are copied to the new record. Your company administrator determines which field values are copied to the new record. However, any links between the record that you copy and any other records are not copied to the new record.

When you copy a record, you can change the values that are copied to the new record and add values in the fields where the values were not copied from the original record.

The following procedure describes how to copy a record.

To copy a record

1 Find the record that you want to copy.

   For information on finding records, see Finding Records (on page 74).

2 In the List page for the record type, click the name link of the record that you want to copy.

   TIP: For many record types, the Copy option is available on the List page. If it is available, select the Copy option on the List page, and then skip to step 4.

3 In the Detail page for the record, click Copy.

4 In the Edit page, enter the details for the new record.

   You can edit the values that were copied from the original record and enter values in the empty fields.

5 Save the new record.

Previewing Records

If the record preview functionality is enabled, you can preview records from record links in many places in Oracle CRM On Demand, including the following:

- My Homepage
- Record Homepages
- Record List pages
- Record Detail pages (including lists of related records)
- Action bar
- The pins that are placed on a map to indicate the locations of addresses that are returned by a proximity search. For information about performing proximity searches, see Performing Proximity Searches (on page 364).

Depending on your record preview settings, the preview window opens when you rest your pointer on a link to a record, or when you click a preview icon, which appears when you rest your pointer on a link to a record. The preview window shows the first section of the Detail page of the record.

The record preview settings can be specified at company level, and by each individual user. Your personal settings override the company setting.

For information about setting your record preview mode, see Setting Your Record Preview Mode (on page 744). For more information about setting the record preview mode at company level, see Setting Up Your Company Profile and Global Defaults (on page 1123).

NOTE: The record preview functionality is not available when you are accessing Oracle CRM On Demand through a device running the iOS operating system.

To preview a record

- Rest your pointer on the record link.
  - If your record preview option is set to Hover on Link, the preview window opens automatically.
  - If your record preview option is set to Click on Preview Icon, an icon appears when you rest your pointer on the link. Click the icon to open the preview window.

NOTE: You cannot use the inline edit functionality or the message center while a preview window is open.

To close the record preview window

- Click the X icon on the preview window, or click the page behind the preview window.

NOTE: If you move your pointer over any UI element (except the preview window, the record link, or the preview icon), the preview window closes automatically after 2 seconds.

About Record Locking

For certain record types, your company administrator can set up processes to restrict the actions that you can perform on a record while a field on the record has a particular value. Restricting users from performing certain actions in this way is referred to as *locking records*. When a record is locked by a process, Oracle CRM On Demand does not allow you to perform the actions that are not permitted by the process, and you might also see an error message if you try to perform an action that is not permitted.

Depending on how your company administrator configures the record-locking processes for your company, the processes can restrict user actions as follows:

- **Record-level actions.** Record-locking processes can prevent you from performing the following actions on a locked record:
  - Updating the record.
  - Deleting the record.
  - Removing the record from a relationship with another record, if removing the record from the relationship results in the record being deleted from Oracle CRM On Demand. However, if removing the record from the relationship does not result in the record being deleted from Oracle CRM On Demand, then you can remove the record from the relationship even if you are prevented from deleting the record.

    For example, your company administrator might set up a process for the Solution record type. The process might prevent you from deleting solutions that have the Approved status, or from updating solutions that have the Obsolete status, and so on.
- **Related record-level actions.** Record-locking processes can prevent you from performing the following actions on records of a given related record type while the parent record is locked:
  - Creating a new record of the related record type from the parent record.
  - Updating records of the related record type that are child records of the parent record. In this case, you cannot update the related records from anywhere in Oracle CRM On Demand while the parent record is locked.
  - Adding an existing record of the related record type to the parent record.

  For example, you might be prevented from linking contact records to a task when the status on the task is set to Completed.
- **Field-level actions.** Record-locking processes can prevent you from updating certain fields while a field on the record has a particular value so that the record is partially locked.

  For example, if your company uses shared addresses, then you might be prevented from updating address lines 1, 2, and 3, the State, Zip or Postal Code, and Country fields while the status on the address is set to Validated. However, you can continue to update any custom fields on the address record.

For information about setting up processes to lock records, see Process Administration (on page 1479).

About Overriding Record-Locking Processes

Certain users are given the Override Process Administration privilege so that they can update locked records. If your user role has the Override Process Administration privilege enabled, then the record-locking processes do not prevent you from performing actions on locked records. In addition, you do not see any warning messages or error messages to indicate that a record is locked.

Updating Record Details

Generally, you can update record information if you own the record, you manage the owner of the record, or the owner grants you editing access to the record. However, your company administrator can adjust access levels to restrict or expand your access to records.

Also, to change the status of a solution record, or to publish a solution, your user role must include the Publish Solutions privilege.

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

You can update records in the following ways:

- **By editing fields inline.** You can edit individual fields inline in record List pages, in record Detail pages, and in linked records on the Detail page of a main record. Your company administrator can enable or disable inline editing in the company profile. By default, inline editing is enabled.

  TIP: In most List pages, you can open a record Detail page in a record pane in the List page without navigating away from the List page. For more information, see About the Record Pane in List Pages (on page 138) and Using the Record Pane in List Pages (on page 139).

  In many record List pages and in many lists of linked records on Detail pages for main records, you can also edit multiple fields in multiple records inline at the same time. If a list supports the ability to edit multiple fields inline at the same time, then a pencil icon is shown at the top-left of the list.

  NOTE: Some types of fields cannot be edited inline in linked records on a main record Detail page. For more information, see Updating Linked Records from Main Records (on page 124).

- **By updating the record in the Edit page.** You can reach the Edit page by clicking the Edit link for a record in the List page, or clicking the Edit button for a record in the Detail page.
- **By importing records:**
  - Using the Import Assistant to import record data from external comma-separated value (CSV) files if your user role has the Personal Import privilege
  - Using the Oracle Data Loader On Demand client utility
  - Using Web services to synchronize records with other applications

  The type of records that you can import depends on the privileges assigned to your user role. For more information on how to import records from external CSV files and other external sources, see Import and Export Tools (on page 1610).

This topic describes how to edit fields inline and how to update records in the record Edit page.

NOTE: You cannot use the inline edit functionality in a record List page while a preview window is open, or while you are using the message center.

Editing Individual Fields Inline

The following procedure describes how to edit individual fields inline in lists of records and on record Detail pages. To allow you to update fields inline, inline editing must be enabled.

NOTE: Sometimes, when you edit an individual field inline, you might be prompted to navigate to the Edit page to complete the edit. This prompt is displayed if you must edit more fields, or if a business process is attached to the field that you were editing inline.

To edit individual fields inline

1 In the list of records, or in a record Detail page, move the pointer over the field that you want to update.

An edit icon appears on the right-hand side of the field. A different icon appears depending on the type of field. On a Detail page, if a field is read-only, when you rest the mouse on the field, no information is displayed. Nothing happens when you click the field. On a Full List page, if a field is read-only, when you pause the pointer on the field, information is displayed. Also, a read-only Inline Editor is displayed when you click the read-only field.

2. Click the edit icon or click the field to enable the Edit mode for Inline Edit.

   For some of the fields, clicking the fields is different from clicking the edit icon. If you click a Phone field, for example, the field displays a Text editor and allows you to enter the phone number directly. If you click the edit icon, it displays a Phone editor and allows the user to specify the Country, Area Code, Phone Number and Extension separately.

3. Update the value of the field.
4. Click the green check mark icon or press Enter to save the changes.

   To cancel changes, click the red X icon, or press Esc.

Editing Multiple Fields Inline in Lists of Records

When editing multiple fields inline in a list of records, note the following points:

- Only the records that are currently displayed in the list are available for you to update. For example, if you filter a list to show only certain records, then only those records are available for you to update.
- Fields that are read-only are grayed out and you cannot update them.
- Required fields are indicated as follows:
  - If a static layout is used for the record type, then the required fields are indicated by a red asterisk and red text in the column header.
  - If a dynamic layout is used for the record type, then the required fields are shown with a red border.
  - If a field is conditionally required, then the field is shown with a red border. A conditionally required field is a field that is not required by default, but becomes required if the data in other fields on the record meets certain criteria.
- If a multi-select picklist field is editable, then the Lookup icon is shown beside the field.
- If a currency field is editable, then the currency icon is shown beside the field.
- If a dynamic page layout is defined for the record type for your role, and if you update the driving picklist field for the dynamic layout, then some fields that were required for the record might no longer be required, or some fields that were not required might become required. Similarly, some fields that were editable might become read-only, or some fields that were read-only might become editable.
- An update that you make to a field might require further updates to the record. In such cases, a message is displayed when you attempt to save your changes. If the field or fields that require the additional updates are displayed in the list, then you can make the additional updates to the fields directly in the list before you save your changes. Otherwise, you are prompted to navigate to the Edit page for the first record in the list that requires the additional updates. If you navigate to the Edit page and update the record, then after you save your changes, Oracle CRM On Demand navigates you back to the list that you were editing.
- If an update to a field in a record fails for any reason when you edit the record inline, then none of the changes to the fields on that record are saved. If the updates to one or more records fail, then an error message displays after you save your changes. The error message lists the records for which the updates failed.

The following procedure describes how to edit multiple fields inline at the same time in a list of records.

To edit multiple fields inline in a list of records

1. In the list of records, click the pencil icon to enable the Edit mode.
2. Update the field values as necessary.

TIP: You can use the Tab key and the up and down arrow keys on your keyboard to move your cursor between fields.

3 When you finish updating the records in the list, click the green check mark icon at the top or bottom of the list to save your changes.

   You can cancel your changes at any time before you save them, by clicking the red X icon at the top or bottom of the list, or by pressing Esc. If you cancel your changes, then none of the changes that you made to the fields in the records in the list are saved.

Updating Record Details In Record Edit Pages

The following procedure describes how to update record details in an Edit page.

To update record details in an Edit page

1. On the record List page, click the Edit link for the record, or from the Detail page click the Edit button in the title bar.
2. On the record Edit page, update the necessary information.
3. Save the record:
   - To save this record and then open the record Detail page (where you can link information to this record), click Save.
   - To save this record and then open the Edit page (where you can create another record), click Save & New.

NOTE: Your administrator can configure a field so that it is conditionally required, that is, the field is not required by default, but becomes required if the data in other fields on the record meets certain criteria. When this happens, a red asterisk (*) displays beside the field that is now a required field, and if the text label is displayed for the field, it is displayed in red text. If the field is blank, then you must update it before you save the record. For information about some limitations that apply when editing conditionally required fields, see About Conditionally Required Fields (on page 1217).

Linking Records to Your Selected Record

In Oracle CRM On Demand, you can link one record to another. Linking records gives you access to all related information from the records that you view. As an example, you can see a complete view of customer information by linking contacts, opportunities, and activities to an account record.

Linking associates records with each other so that you and others who have access rights to the record have a full view of the information.

You use Lookup windows to search for and select existing records that you want to link to the record you are working with. Depending on how your company administrator sets up the search layout for a record type for your role, the Lookup window for that record type might be populated with records when the window opens. For more information about Lookup windows and how to use them, see Searching for Records in Lookup Windows (on page 101). For information about how smart associations can help you to find a record that you want to associate with another record, see About Smart Associations and the Auto-Resolve Functionality (on page 106).

Linking New and Existing Records

From the record Detail pages, you can do one or both of the following, depending on the record types you are working with:

- Link existing records to a main record.
- Create new records that are automatically linked to the main record.

New records are added to the database at the same time that they are linked to the selected record. For example, an activity you create from the Lead Detail page is linked to the lead, and then appears in the Activities pages.

NOTE: You can also edit some fields on linked records from the main record Detail page if inline editing is enabled. For information about editing linked records from the main records, see Updating Linked Records from Main Records (on page 124).

The following procedure describes how to link one or more records to your selected record in the related information section of the record Detail page.

To link an existing record to your selected record

1 Select the main record.

   For more information about selecting records, see Finding Records (on page 74).

2 On the record Detail page, scroll down to the appropriate related information section, and click Add.

   Depending on the record types that you are linking, either a multiassociation Lookup window or a list page opens.

3 Do one of the following:

   - In the multiassociation Lookup window, click Select for each of the records that you want to link to your main record, and then click OK.
   - In the list page, click the Lookup icon next to the field to open the Lookup window, and then click Select for the record that you want to link to your main record.

If your administrator makes the List Add button available in a related information section, then you can add multiple records to your selected record, as described in the following procedure.

NOTE: The List Add feature does not support the creation of integration events through workflow actions. Similarly, the List Add feature does not support modification tracking. If your company needs to create integration events when records are linked or unlinked, or needs to track run-time modifications to records, then do not use List Add to link records to your selected record. Also, do not use the List Add feature if your administrator has specified any field as required in the main record Detail page. The List Add feature does not work in this configuration.

To link multiple existing records to your selected record using List Add

1 Select the main record.

   For more information about selecting records, see Finding Records (on page 74).

2 On the record Detail page, scroll down to the appropriate related information section, and then click List Add.

3 In the list of records, click Select for each of the records that you want to link to your main record, and then click OK.

   TIP: In the List page, you can also click Remove to remove a record from the list of linked records. You can navigate through the pages of records in the list, filter the list, and change the sort order of the records. You can also start an advanced search for records.

The following procedure describes how to create a new record and link it to your selected record.

NOTE: Depending on the record types that you are working with, you might not be able to create a new, linked record from your selected record.

To create a new record and link it to your selected record

1 Select the main record.

   For more information about selecting records, see Finding Records (on page 74).

2 On the record Detail page, scroll down to the appropriate related information section, and then click New.

NOTE: In some cases, the New button is not available in the related information section. Instead, you must click Add and then click New in the Lookup window to open the form where you can create the new record.

3. In the Edit page, create a new record and save it, by clicking either Save or Save and Continue:
   - If you click Save, then Oracle CRM On Demand saves the new record and navigates you to the main record's Detail page.
   - If you click Save and Continue, then Oracle CRM On Demand saves the new record and navigates you to the child record's Detail page so that you can associate additional content to the child record, for example, notes and attachments.

     NOTE: This navigation only applies to child records that can have other associated record types through related information sections. For example, attachments and notes do not have the Save and Continue button available.

   In either case, Oracle CRM On Demand automatically links the new record to the main record.

The following procedure describes how to remove or delete a linked record from the related information section of the record Detail page.

To remove or delete a linked record

1. Select the main record.

   For more information about selecting records, see Finding Records (on page 74).
2. On the record Detail page, scroll down to the appropriate related information section.
3. In the row for the record that you want to remove or delete, select one of the following options from the record-level menu:
   - **Remove.** This option disassociates the records without deleting either of the records.
   - **Delete.** This option deletes the linked record. A deleted record is moved to the Deleted Items page and is permanently removed from the database after 30 days.

   NOTE: Where multiassociation Lookup windows are available, you can also remove linked records by clicking Remove for each of the linked records in the multiassociation Lookup window.

Examples of Record Types Linked to Other Record Types

The following table shows some examples of record types that you can link to other records in Oracle CRM On Demand. In the Information column, instructions on how to link the record type from the Details page of the main record are given.

The record types that you can link to your selected record depend on the type of record you are working with, as well as the customization that you or your managers have made to Oracle CRM On Demand. In addition, if you are working in a particular edition of Oracle CRM On Demand, such as Oracle CRM On Demand for Partner Relationship Management or an industry-specific edition of Oracle CRM On Demand, you can link additional record types.

Record Type	Information
Account	**In the standard application, the Accounts section is available on the Detail pages for contact records. You might need to add the section to your layout:** To link an existing account and track the role it plays in relation to the contact, click Add. On the Add Account page, select an account, select the role it plays for this contact, and click Save. If the account you want to add does not exist, you can add it by clicking New in the Lookup window. For field descriptions, see Account Fields (on page 284).

Record Type	Information
	If the account has more than one role, click Edit Roles in the appropriate row, select the roles, and save the record.
Account Partners	**In the standard application, the Account Partners section appears on the Detail pages for account records. You might need to add the section to your layout:** To link an account and track it as your partner for this record, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (on page 276).
Account Relationships	See Tracking Relationships Between Accounts (on page 273).
Account Team	See Sharing Records (Teams) (on page 146).
Campaigns	**From contact records only:** To link a campaign, click Add, select the campaign, and save the record. For field descriptions, see Campaign Fields (on page 240).
Competitors	**In the standard application, the Competitors section appears on the Detail pages for account and opportunity records:** To link an account and track it as your competitor for this record, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (on page 276).

Record Type	Information
Contacts	**In the standard application, the Contacts section is available for activity records (tasks and appointments). You might need to add it to your layout:** To link the Primary Contact, click Edit and link the contact. To link additional contacts to the activity, scroll down to the Contacts section, click Add, and link the contact records. **In the standard application, the Contacts section appears on the Detail pages for account records:** To link a new contact, click New, enter the required information in the Edit form, and save the record. To link an existing contact, click Add. On the Contact List page, select a contact and click Save. If the contact you want to add does not exist, you can add it by clicking New in the Lookup window. For field descriptions, see Contact Fields (on page 305). **In the standard application, the Contacts section appears on the Detail pages for opportunity records:** To link an existing contact to your opportunity record, click Add. In the Contact List form, select a contact, define the contact's Buying Role, and click Save. If the contact you want to add does not exist, you can add it by clicking New in the Lookup window. For field descriptions, see Contact Fields (on page 305). You must select a Buying Role to clarify a contact's responsibilities within a company, and the contact's influence on purchasing decisions. The Buying Role is critical for Key Role Analysis and for understanding the selling political environment. **NOTE:** You can link the same contact to several opportunities or several contacts to the same opportunity.
Contact Relationships	See Tracking Relationships Between Contacts (on page 298).
Contact Team	**From contact records only:** To allow the contact record to be visible to other employees, click Add Users. In the Contact Team Add User window, select the user's name and the user's access rights for the record (in the Contact Access field), and then save your changes. For more information on sharing records, see Sharing Records (Teams) (on page 146).
Leads	**In the standard application, the Leads section appears on the Detail pages for campaign records:** To link a new lead, click New, enter the required information in the Lead Edit form, and save the record. For field descriptions, see Leads Fields (on page 258).

Record Type	Information
Notes	**In the standard application, the Notes section appears on the Detail pages for record types that support the notes feature:** To link a new note, click New, enter the required information in the record Note form, and save the record. For field descriptions, see Adding Notes (on page 157).
Open Activities	**In the standard application, the Open Activities section appears on the Detail pages for a number of record types:** To link a new appointment or task, click New Appt or New Task in the title bar. Then enter the required information in the Edit form and save the record. For field descriptions, see Activity Fields (on page 229). You can link several activities to your selected record. If an activity has a time associated with it, the activity appears in the Activities list and Calendar. Users that can view the selected record can also see the activities linked to the record, including those activities owned by or assigned to others. For information about working with lists of activities, see Working with Activity Lists (on page 203). **NOTE:** Depending on the record type and on the Detail page layout that your company administrator assigns to your role for the record type, the open appointments and tasks that are linked to a record can be shown separately on the record Detail pages, in the Open Appointments related information section, and the Open Tasks related information section. Also, on some record types, an Activities related information section shows both open and completed activities.
Opportunities	To link a new opportunity, click New, enter the required information in the Opportunity Edit form, and save the record. For field descriptions, see Opportunity Fields (see Opportunity Fields on page 326). **NOTE:** To link an opportunity to a lead, convert the lead that is associated with the campaign to an opportunity. For more information, see Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 252).
Opportunity Partners	**In the standard application, the Opportunity Partners section appears on the Detail pages for opportunity records:** To link an account and track it as your partner for this record, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see Tracking Partners and Competitors of Opportunities (on page 314).
Referral	See Adding Referrals (on page 300).

Record Type	Information
Related Solutions	**In the standard application, the Related Solutions section appears on the Detail pages for solution records:** To add a solution, click Add Solution and select an existing solution in the Lookup window. You can add as many solutions as you like. You may want to link solutions to each other if they share related information or are about a related topic. To create a new solution, click New, fill in the required information, and save the record. **NOTE:** You can review linked service requests from the Solution Detail page, but you must link them from the Service Request Detail page.
Service Requests	**In the standard application, the Service Requests section appears on the Detail pages for account and contact records:** To link a new service request, click New, enter the required information in the Service Request Edit form, and save the record. For field descriptions, see Service Request Fields (on page 401).
Solutions	**In the standard application, the Solutions section appears on the Detail pages for service request records:** To link a solution, click Add. In the Lookup window, you can click the Solution ID link to link an existing solution or click New to create a new solution. For field descriptions, see Solution Fields (on page 409). **TIP**: Before creating new solutions, check the Solution List page to make sure the solution is not waiting for your manager to publish it. The Lookup window shows only solutions marked Published with a status of Approved.
Team	**The Team section does not appear by default on any record detail page in the standard application, but your company administrator can add the Team section to certain record types:** To allow this record to be visible to other employees, click Add Users. In the Team Add Users window, select the user's name. **NOTE**: If the record owner is part of a Group, (defined by your company administrator), the group members automatically appear in the Team Related Information section. For more information, see Sharing Records (Teams) (on page 146).
User	**The User section does not appear by default on any record detail page in the standard application, but your company administrator can add the User section to certain record types:** To track another employee involved in a task, in the Users section of the Task Details page, click Add. In the Lookup window, select the user. **NOTE**: Unlike the Team feature, if the record owner is part of a Group (defined by your company administrator), the group members do not

Record Type	Information
	automatically appear in the User Related Information section. The User list does not affect visibility to records; it is used strictly for tracking.

Updating Linked Records from Main Records

You can update fields in a linked record from the main record as follows:

- By editing fields inline, if inline editing is enabled. You can edit individual fields inline in the list of linked records on the Detail page of the main record. In many lists of linked records, you can also edit multiple fields in multiple records inline at the same time. If a list of linked records supports the ability to edit multiple fields inline at the same time, then a pencil icon is shown at the top-left of the list.

  Note that you cannot edit the following types of fields in linked records from the Detail page of the main record:

  - Fields that are not shown in the Detail page of the linked record itself
  - Calculated fields, for example, Full Name
  - Fields that are read-only on the Edit page of the linked record

  Also, in cases where the same linked record can show up under multiple main records, the fields that are part of the relationship can be edited. However, the fields that belong to the linked record itself cannot be edited. For example, in the Account Team related list on an account record, the Team Role field can be edited, because the field is part of the relationship between the account and the team member. However, the Last Name and First Name fields cannot be edited, because they belong to the user record (of the team member).
- By opening the Edit page for a linked record from the Detail page of the main record, and updating fields on that page.

The following procedure describes how to update a linked record on the main record Detail page.

To update a linked record on the main record Detail page

- On the Detail page of the main record, scroll down to the appropriate section, and edit the fields as necessary.

  NOTE: If the record that you want to edit is not displayed on the page, click the Show Full List link to see all of the linked records of that type, and then edit the record fields in the List page.

  For more information on editing fields inline, see Updating Record Details (on page 115).

The following procedure describes how to open a linked record from the main record Detail page.

To open a linked record from the main record Detail page

1. On the Detail page of the main record, scroll down to the appropriate section.
2. Click the Edit link for the record (if one is provided), or click the name link of the linked record.

   NOTE: If the record that you want to edit is not displayed on the page, click the Show Full List link to see all of the linked records of that type.

3. When the Edit or Detail page for the linked record opens, update the record details.

   For more information on updating record details, see Updating Record Details (on page 115).

Favorite Records Page

The Favorite Records page shows your favorite records. You access the Favorite Records page by clicking Show Full List in the Favorite Records section of the Action bar. You can have a maximum of 100 records in your favorites.

NOTE: If there are already 100 records in your favorites, and you add another record to your favorites, then the record that has been in your favorites for the longest time is dropped from your favorites to allow the new record to be added.

From the Favorite Records page, you can perform the tasks shown in the following table.

To do this	Follow these steps
Change the sequence of the records	In the Favorite Records title bar, click the Manage Favorites button. On the Manage Favorites page, change the order of the records until it reflects the sequence that you want. The records then appear in the new sequence on the Action bar and the Favorite Records page.
Delete a record from the list of favorites	In the row for the record that you want to delete, click the Delete link. **TIP:** You can also remove a record from your favorite records by clicking the Remove from Favorites icon, which is available in the record Detail page and in the row for the favorite record in List pages.
Display details of a record	Click the name of the record to display the Detail page for the record.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed in the drop-down list at the bottom of the page, select a number of records to see at once.

Working with Lists

For many record types, you can limit the records you see by using filtered lists. A filtered list shows a subset of the records that meet the criteria making up the list.

Oracle CRM On Demand provides standard filtered lists for many record types. Users who have the Manage Public Lists privilege in their user role can create custom filtered lists and make them available for other users. Your company administrator can determine which lists are available for your user role. You can also create additional custom filtered lists to return the records that you want to work with. For more information, see Creating and Refining Lists (on page 130). From the lists that are available to you for a top-level record type, you can choose the set of lists that is shown in the Homepage and in picklists of lists. For more information, see Changing Sets of Lists for Record Types (on page 142).

When you select a filtered list, the list of records that meet the list criteria opens in the record List page. You can choose to display the first 5, 10, 25, 50, 75, or 100 records in the page at one time. The option you choose is maintained in the List pages for all record types, until you change it again. When you browse a list, the record on which your pointer is resting is highlighted by a change in the background color.

Depending on your company setup and the setup in your user profile, the column headings in List pages might always remain in view when you scroll down a page of records. This feature can be turned on or off at company level, but you can override the company-level Freeze List Column Header setting in your personal profile. For information about changing the Freeze List Column Header setting in your personal profile, see Updating Your Personal Details (on page 734).

NOTE: Oracle CRM On Demand can use only one method of collation to determine the sort order within lists. The collation method was chosen to provide the best solution for all languages. However, it can result in some letters appearing in the wrong order in some languages.

What Happens If There Is More Than One Page of Records?

If there are more records in the list than can be shown on one page, then the following occurs:

- You can click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
- If you click the icon to go to the last page in a list, then the last page shows a full page of records, and the number of records shown on the last page in the list is determined by the number of records that you choose to display in your list page.

  For example, assume that a list has a total of 60 records, and you choose to display 25 records in your list page. If you click the icon to go to the last page in the list, then the last 25 records in the list are displayed on the page.
- If you navigate through a list one page at a time, then the last page in the list shows only the remaining records in the list.

  For example, assume that a list has a total of 60 records, and you choose to display 25 records in your list page. If you navigate through the list one page at a time, then each of the first two pages of the list shows 25 records, and the last page shows the remaining 10 records in the list.

Tasks That You Can Perform from the List Pages

From the List pages, you can do the following:

- Sort the records.
- Review multiple records at a glance.
- Find a record to review, delete, or update.
- Update the fields on the List page inline, if the inline edit functionality is enabled.
- Open a record Detail page in the record pane and update the record details without navigating away from the List page, if the record pane is available in the List page.
- Create new records.
- Add the list to your favorite lists by clicking the Add to Favorites icon in the right-hand side of the title bar in the List page.
- Remove the list from your favorite lists by clicking the Remove from Favorites icon in the right-hand side of the title bar in the List page.
- Add a record to your favorite records by clicking the Add to Favorites icon in the row for the record.
- Remove a record from your favorite records by clicking the Remove from Favorites icon in the row for the record.
- Refine the list within the List page, if the Toggle Refine List Pane icon is available. For more information, see Refining Lists Within List Pages (on page 137).
- Change the order of the columns in the list, by dragging the column headings to a new location and dropping them. You can optionally save the list after you change the order of the columns.

About Reordering Columns in List Pages

You can reorder the columns in a list directly in the List page. When you hover over a column heading, a four-directional arrow appears, and you can then drag the column to the new location and drop it. If more columns are available than can be displayed on your browser page, then when you drag a column header to the edge of the displayed columns, the page automatically scrolls to display the additional columns. The changed order of the columns continues to apply when you perform actions that refresh the page, such as paging through the list, sorting the list, using the Alpha Search controls and Quick Filter fields, and so on. The changed order also continues to apply if you open a record Detail page from the list and then return to the list. However, after you navigate away from the list, the next time you open the list, the columns appear in the original order unless you saved the list after you reordered the columns.

About Using Custom Fields to Sort Lists

For performance reasons, some custom fields cannot be used to sort lists. The following general rules apply:

- You cannot use the following types of custom fields to sort lists of any record type, including the custom object record types:
  - Check box fields
  - Web link fields
  - Multi-select picklist fields

  However, for any given record type, there might be other types of custom fields that you cannot use to sort lists.
- For the Custom Object 01 through 03 record types, you cannot use any type of custom field to sort lists.

Actions That You Can Perform on the Listed Records

In addition, you can use the record-level menu (beside each record name) to perform various actions on the listed records, including some or all of the following:

- Open the Edit page for the record (by selecting the Edit option), where you can edit all of the fields on the record.
- Create a new record by copying the existing record. Your company administrator determines which field values are automatically copied to the new record.
- Delete a record.

You can filter the list further if there are too many records on the page. For more information about quick ways of filtering your lists, see Filtering Lists (on page 136).

Each filtered list is specific to the record type, such as Opportunities or Accounts. All employees can create filtered lists for their own use, but you need to be assigned the appropriate role to create public lists that are available to all employees.

NOTE: A list that you or your managers create appears in only the language it is created. If you switch languages, it is not added to the lists in the other languages that the application supports. Only the default filtered lists appear in all languages. For example, if an Italian manager creates a new list and some of her team uses the Spanish version of the product, her team members don't see the newly-created list.

About Creating Bookmarks for List Pages

In most lists, the pages in the list share the same URL. As a result, when you create a bookmark for a page within a list, the bookmark always opens the list at the page that opened when you first accessed the list (usually the first page in the list). Similarly, when you copy the URL from the address field of a page within a list and later paste the URL into your browser address field, the list opens at the page that opened when you first accessed the list.

For example, when you open a list from a list link on the Account Homepage, the list opens at the first page. If you navigate to the third page in the list and create a bookmark for that page, then the new bookmark will open the list at the first page (that is, the page that opened when you first accessed the list).

List Management Options

In the List page for most record types, there is a Menu button with some or all of the following options:

- **Batch Delete**. Delete all the records from a list, see Deleting and Restoring Records (on page 173).
- **Batch Assign Book**. Add records to a book or remove records from a book, see Assigning Records to Books (on page 1454).
- **Batch Assign Team Member.** Add a team member to a list of records or remove a team member from a list of records, see Assigning a Team Member to a List of Records (on page 148).

- **Export List.** Export a list to save on your computer, see Exporting Records in Lists (on page 143).
- **Mass Update**. Update a number of records at once, see Updating Groups of Records (on page 150).
- **Mass Call Planning**. Create a planned call for one or more customers, see Mass Call Planning (on page 213).
- **Mass Create Appointment.** Create an appointment for one or more accounts, see Creating Appointments for Multiple Accounts (on page 282).
- **Record Count.** Count the records in a list, see Counting Records in Lists (on page 143).
- **Refine List**. Refine a filtered list, see Creating and Refining Lists (on page 130).

  NOTE: In the List pages for most record types, you can also refine the list without leaving the List page, and optionally save the refined list. For information about refining lists within List pages, see Refining Lists Within List Pages (on page 137).

- **Save List**. Saves a list. When you click Save List, this brings you directly to a page with Save options.
- **Show List Filter**. Show the key information for a list, see View List Page (on page 141). You can also access this page by clicking View in the Manage Lists page.
- **Create New List**. Create a new filtered list, see Creating and Refining Lists (on page 130).
- **Manage Lists**. Manage the lists for the record type, see Manage Lists Page (on page 140).
- **Batch Restore**. Restore a deleted list of records, see Deleting and Restoring Records (on page 173).

Accessing the List Management Options

The way in which you navigate to the list management options varies with the record type as shown in the following table:

Record Type	Steps
Main record types (on tabs)	1 Click the record tab at the top of the page. 2 In the Lists section, click a list. 3 Click the Menu button and select the required option. You can also access the New List page as follows: 1 Click the record tab at the top of the page. 2 In the title bar of the Lists section, click the New button.
Activities	1 Click the Calendar tab. 2 In the activity list section, click the Show Full List link. **NOTE:** In the standard application, the Open Tasks list is shown in the daily and weekly views of your own calendar and the individual calendars of other users who share their calendar with you. However, you can select a different list to be displayed, or your administrator can select a different list for your user role. For more information, see Setting Up Your Calendar (on page 759). 3 Click the Menu button and select the required option.
Alerts	1 Click the Home tab. 2 At the bottom of the Alerts section on My Homepage, click the Show Full List link. 3 Click the Menu button and select the required option. **NOTE:** If there are no alerts, the Show Full List link does not appear.

Record Type	Steps
Attachments	Available only if your role includes the Manage Content - Manage Attachments and Detail Page Images privilege. 1 At the top of any page, click the Admin global link. 2 Click the Content Management link. 3 On the Content Management page, click the Manage Attachments link. 4 On the Manage Attachments page, click the Create New List button.
Users	Available only if your role includes the Manage Users privilege. 1 At the top of any page, click the Admin global link. 2 Click the User Management and Access Controls link. 3 Click the User Management link. 4 Click the Menu button and select the required option.
Product Categories	Available only if your role includes the Manage Content privilege. 1 At the top of any page, click the Admin global link. 2 Click the Content Management link. 3 On the Content Management page, click the Product Categories link. 4 Click the Menu button and select the required option.
Products	Available only if your role includes the Manage Content privilege. 1 At the top of any page, click the Admin global link. 2 Click the Content Management link. 3 On the Content Management page, click the Products link. 4 Click the Menu button and select the required option.

Standard Filtered Lists

For a description of the standard filtered lists, see the Working with the *record type* Homepage topic for each record type; for example:

- Working with the Leads Homepage (on page 247)
- Working with the Account Homepage (on page 266)
- Working with the Contacts Homepage (on page 287)
- Working with the Opportunity Homepage (on page 311)
- Working with the Service Request Homepage (on page 396)

To open a list

1 Click the record tab.
2 From the Lists section on the record Homepage, select the list you want to work with.

NOTE: For lists of activities, click the Calendar tab and then click Show Full List in the activity list section of the page. For information about working with lists of activities, see Working with Activity Lists (on page 203).

Related Topics

See the following topics for related information:

- About the Record Pane in List Pages (on page 138)
- Using the Record Pane in List Pages (on page 139)

Creating and Refining Lists

When you create or refine a list of records, your user role determines which fields you can search and which fields you can display in the list, as follows:

- If the All Fields in Search and Lists privilege is enabled on your user role, then you can search all of the search fields that your company administrator makes available in the search layout that is assigned to your user role for the record type.

  NOTE: It is recommended that company administrators do not enable the All Fields in Search and Lists privilege for most user roles. When the privilege is not enabled, fields that your company does not use are not visible in search and list pages. This reduces clutter and makes it easier for users to see the fields that they are most interested in.

- If the All Fields in Search and Lists privilege is not enabled on your user role, then you can search a field only if it meets both of the following criteria:
  - The field is an available search field in the search layout that is assigned to your user role for the record type.
  - The field is displayed on the Detail page layout that is assigned to your user role for that record type. If dynamic page layouts are defined for your role, then the field must be displayed on at least one of the dynamic page layouts.

  NOTE: *Dynamic 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.

- When you refine an existing list, some of the fields in the search criteria for the list might not be available to your user role. Any such restricted fields are grayed out, and you cannot edit them. You can remove the restricted fields from the search criteria before you run or save the list. If you run or save the list without removing the restricted fields from the search criteria, then Oracle CRM On Demand automatically removes the restricted fields from the search criteria before running or saving the list.

NOTE: Your company administrator can change the sets of fields that are available in the search layouts for your user role at any time. If your company administrator removes a field that was previously available to you for searching, then the next time that you refine a list with a filter that contains that field, you cannot save the list with that field in the filter. If you do not remove the field from the filter, then Oracle CRM On Demand automatically removes the field from the filter before running or saving the list.

You cannot search fields of the Note field type.

Your User Role Determines Which Fields You Can Display in the List of Records

Your user role also determines which fields you can display in the list of records that is returned by the search, as follows:

- If the All Fields in Search and Lists privilege is enabled for your user role, then you can select any field to display as a column in the list of records that is returned by the search.

- If the All Fields in Search and Lists privilege is not enabled for your user role, then you can select a field to display as a column in the list of records that is returned by the search only if the field is displayed on the Detail page layout that is assigned to your user role for the record type. If dynamic page layouts are defined for your role, then the field must be displayed on at least one of the dynamic page layouts for the record type.

About the Sort Fields

Lists with no specified sort field are automatically sorted on the displayed column that provides the most efficient performance. Therefore, it is recommended that you do not specify a sort field when you create a list. In the standard application, a sort field is automatically selected in the New List page, but you can clear the sort field. Your administrator can set up the search layout for a record type for your user role so that a sort field is not automatically selected. For information about setting up search layouts, see Managing Search Layouts (on page 1296).

You can optionally specify the initial sort order for the records that are returned in the list. You can select up to three sort fields. For example, for a list of contacts, you might choose to sort the list first by Last Name, then by First Name, and then by Department. For each of the three sort fields, you can specify whether the records are to be sorted in ascending order or in descending order.

If you specify the sort order, then as a best practice use the most restrictive available field as the first sort field, particularly if the search is for a record type that has a large number of records. For example, a search on the Email field for the Contact record type is more efficient if the results are also sorted on the Email field rather than another field such as the Contact Last Name field.

After you select the first sort field, only the sort fields that are stored directly on the same record as the first sort field are available for you to select as the second and third sort fields. For example, when searching for contacts, you might select the First Name field on the contact as the first sort field. In that case, only the remaining sort fields that are stored directly on the contact record are available for you to select as the second and third sort fields. Fields that are stored on other records, such as the Account field, which is stored on the account record, are not available.

NOTE: If your user role has the Manage Private Lists privilege, then you can access and edit other users' private lists. If your user role has the Delete Private Lists privilege as well as the Manage Private Lists privilege, then you can also delete private lists that were created by other users. Typically, the Manage Private Lists and Delete Private Lists privileges are given to administrators only. For information about the considerations that apply when editing other users' private lists, see About Editing and Deleting Private Lists Created by Other Users (on page 135).

You cannot use a field of the Note field type to sort a list of records.

The following procedure describes how to set up a list.

Before you begin. When you create a list, you need to enter the fields and values for the criteria that you set up. You might want to first go to the record Edit page, and write down the exact field names and values as they are used in Oracle CRM On Demand. Otherwise, your filtered list might not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names. However, the printout does not capture the field values for drop-down lists.

To set up a list

1. Create a new list or navigate to the Refine List page for an existing list.

   In the List page for most record types, there is a Menu button that includes the options to create a new list or refine an existing list. For more information about accessing list management options, see Working with Lists (on page 125).

   NOTE: In the List pages for most record types, you can also refine the list without leaving the List page, and optionally save the refined list. For information about refining lists within List pages, see Refining Lists Within List Pages (on page 137).

2 In the New List page or the Refine List page, in the Search In section, select one of the following options:
- Record Set
- Book

NOTE: The Search In section is not displayed for record types that do not have owners, for example, the Product record type and the User record type. The Book option in the Search In section is available only if the Book feature is enabled for your company.

3 If you select the Record Set option, select one of the following from the list in the Record Set field:
- **All records I can see.** Includes records that you have at least View access to, as defined by your reporting hierarchy, the access level for your role, and the access level for shared records.
- **All records I own.**
- **All records where I am on the team**. Includes only records in the filtered list where one of the following applies:
  - You own the records.
  - The records are shared with you by the owner through the Team feature.
  - The records are shared with you through the group assignment feature for accounts, activities, contacts, households, opportunities, and portfolios.
- **All records I or my subordinates own**.
- **All records where I or my subordinates are on the team**
- **My Default Book**. Your default setting for the Book selector, as defined by your company administrator.

4 If you select the Book option, select a book, user, or delegate in the Book selector.

For more information, see Using the Book Selector (on page 106).

5 In the Choose Case Sensitivity section, select the Case Insensitive check box, if required.

If this check box is selected, then certain fields become case-insensitive for the search. These fields are shown in blue text in the Enter Search Criteria section.

6 In the Enter Search Criteria section do the following:

a (Optional) If you are refining an existing list filter that contains a search field that is not available to your user role, remove the search field from the list by clicking the X icon beside the field row.

If a search field in the list filter is not available as a search field for your user role, then the field is grayed out, you cannot edit it, and an X icon appears beside the field. You can remove the restricted fields from the list filter. If you run or save the list without removing the restricted fields from the filter, then Oracle CRM On Demand automatically removes the restricted fields from the filter before running or saving the list.

b Select a field from the Field list.

The fields are prepopulated with the targeted search fields for the record type.

NOTE: If your company administrator does not make any search fields available in the search layout that is assigned to your user role for a record type, then you cannot specify any search criteria for a list of records of that record type.

Certain fields are optimized to improve performance during searches and when sorting lists. These optimized fields are shown in green text in the list of search fields. If your search criteria include a field that is not optimized for searching, your search might be slower.

NOTE: The fields that are shown in purple text in the Enter Search Criteria section are always case-insensitive, regardless of the setting of the Case Insensitive check box. These fields are not optimized for fast searches.

If the address field you need does not appear in the drop-down list, select the corresponding one shown in the following table or in About Countries and Address Mapping (on page 1615).

NOTE: The fields listed in this table might not apply to all countries or locales.

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code
MEX State BRA State Parish Part of Territory Island Prefecture Region Emirate Oblast	Province
Island Code Boite Postale Codigo Postal	Zip/Post Code

c Enter the conditions, filter values, and operators (AND, OR) that define the filter.

If you are refining a list, the fields are already populated with criteria that you can refine further.

For information about using filter conditions, see About Filter Conditions (on page 77).

TIP: To create a list of service requests that do not have an owner, select the Owner ID field, the Equal to filter condition, and leave the value blank. You can create other null lists using this general approach.

CAUTION: When entering Filter Values, check to make sure that you are following the rules described in About Filter Values (on page 81). Otherwise, the correct records might not be included in the list.

Examples

Accounts: If you want to create a filtered list of accounts in Canada with annual revenue over $100,000,000.00, complete the form as follows:

Field	Condition	Value(s)	
Annual Revenue	Greater than	100000000	AND

Field	Condition	Value(s)	
Country	Equal to	Canada	

Leads: If you want to create a filtered list of leads with potential revenue over $100,000.00 and ratings of A or B, complete the form as follows:

Field	Condition	Value(s)	
Potential Revenue	Greater than	100000	AND
Rating	Less than	C	

7 In the Display Columns section, choose the fields to display as columns in the search results by moving fields from the Available Fields list to the Selected Fields list. Use the up and down arrows to change the order of the selected fields.

TIP: After the list of records is returned, you can quickly change the order of the columns in the list by dragging the column headings to a new location and dropping them. You can optionally save the list after you change the order of the columns.

8 (Optional) In the Sort Order section, specify the initial sort field or fields that you want, and the sort order, as follows:

- If you do not want to specify a sort field, and if a sort field is already selected, then clear the sort field.
- If you want to specify one or more sort fields, then do the following:

a In the Sort by drop-down list, select the first sort field, and then click Ascending or Descending to specify the sort order.

b Select a second sort field, and a third, as needed, and then specify the sort order for these fields.

Certain fields are optimized to improve performance during searches and when sorting lists. These optimized fields are shown in green text in the list of sort fields. If you select a field that is not optimized as a sort field, then your search could be slower.

NOTE: You cannot select a field of type check box as the sort field in this step. However, after the list is created, you can click the column header to sort the fields based on the values in the check box.

9 (Optional) To see the results of your search criteria without saving the list, click Run.

The List page appears displaying the results of your search criteria. You can then click the Menu button in the title bar, and select Save List or Refine List to save your list.

10 Click Save, and complete the fields in the Save options section:

Field	Comment
List Name	Type a name for the list (50-character limit). You can use any symbols or punctuation marks except quotation marks (“”) in your List Name. Created lists are arranged in ascending ASCII code order, which means that the sort order is case sensitive. So, all of the list names that start with an uppercase letter appear before the list names that start with a lowercase letter.
Description	Enter a description of up to 251 characters.

Field	Comment
List Accessibility	If your user role includes the Manage Public Lists privilege, select one of these options: ■ **Private.** Makes the list available only to you and to users who have the Manage Private Lists privilege in their role. ■ **Public.** Makes the list available to all employees. Public lists appear on the record Homepage for all employees at your company. ■ **Role Specific**. Makes the list available only to users with a specific role.

1 (Public lists only) In the Choose List Availability for Roles with List Order Layout section of the page, specify the availability of the list for the roles for which a list order layout has been defined for the record type, as follows:
   - If you do not want the list to be available to a role, then use the directional arrows to move the role to the List Not Available For section.
   - If you want the list to be available to a role and you also want the list to be included in the short list of lists for the record type for the role, then use the directional arrows to move the list to the List Shown in Short List For section. The lists in the short list appear in the List section in the record-type Homepage and in picklists of lists for the record type.
   - If you want the list to be available to a role but you do not want the list to be included in the short list of lists for the record type for the role, then leave the role in the List Available For section.

   The Choose List Availability for Roles with List Order Layout section is available only if all of the following are true:
   - Your user role has either the Customize Application privilege or the Manage Role Lists Order privilege, as well as the Manage Public Lists privilege.
   - You are either creating a new public list or refining an existing list and saving it as a new public list. Note that if you are refining a public list and overwriting the existing list, then the Choose List Availability for Roles with List Order Layout section is not available.
   - A list order layout is defined for one or more roles.

   Only the roles for which a list order layout has been defined are shown in the Choose List Availability for Roles with List Order Layout section.

2 Click Save and Run.

   The filtered list you created appears in the drop-down list in this page's title bar and in the Lists section of the record Homepage.

TIP: If a message appears indicating that your list request has timed out, refine your list criteria further and try again. You can find more information about optimizing searches and lists on the Training and Support Center Web site, which you can access by clicking the Training and Support global link at the top of each page in Oracle CRM On Demand.

About Editing and Deleting Private Lists Created by Other Users

If your user role has the Manage Private Lists privilege, then you can access and edit other users' private lists through the Manage Lists page for the record type. If your user role has the Delete Private Lists privilege as well as the Manage Private Lists privilege, then you can also delete private lists that were created by other users. You can open the Manage Lists page by clicking the Manage Lists link in the Homepage for the record type, or by selecting Manage Lists from the Menu button in a List page for the record type. For more information about the Manage Lists page, see Manage Lists Page (on page 140).

When editing the private lists that were created by other users, the following considerations apply:

- In the Manage Lists page, you can access the private lists that other users created for the record type in your current user language. If you want to edit the private lists that other users created in a different language, then you must change to that language. For information about changing your language, see Changing Your Language Setting (on page 745).
- It is recommended that your user role is set up so that all of the search fields that are available to other users for the record type are also available to you. Otherwise, you might not be able to edit some lists successfully. If you attempt to edit a list that includes a search field that is unavailable to you, then the following happens:
  - The field is grayed out, and you cannot edit it.
  - When you save the list, Oracle CRM On Demand automatically removes the field from the search criteria.
- If you intend to add a search field to a list definition, then make sure that the list owner has the necessary access permissions for that field. For information about how access to fields in lists is determined, see Creating and Refining Lists (on page 130).
- If you intend to select a book for the search, then make sure that the list owner has access to the book.
- When you save and run the list, the list of records that is returned is determined by which records are visible to you, rather than by which records are visible to the list owner.

Filtering Lists

In a List page you can quickly filter the records in the list in two ways:

- Using the Alpha Search controls to filter on a particular column

  NOTE: If your user language is Korean, Japanese, Simplified Chinese, or Traditional Chinese, then the Alpha Search controls are not available.

- Using the Quick Filter fields

By default, the list pages show the Alpha Search controls when they are available, but you can click the filter toggle icon to show the Quick Filter fields. To switch back to the Alpha Search controls, you can click the ABC icon. The search controls that are displayed persist across different sessions.

NOTE: The Alpha Search controls and the Quick Filter fields that you typically use to filter a list are not available while the record pane is open. If you want to filter the list, then you must close the record pane. For information about the record pane, see About the Record Pane in List Pages (on page 138) and Using the Record Pane in List Pages (on page 139).

You can also restrict the records that are searched by selecting a book or user from the Book selector. For more information, see Using the Book Selector (on page 106).

For more advanced filtering, you can refine the list criteria. For more information, see Refining Lists Within List Pages (on page 137) and Creating and Refining Lists (on page 130).

Alpha Search

An arrow next to a column header in the list indicates that the column is used for sorting and filtering the list and also indicates whether the list is sorted in ascending or descending order. You can change the column that is used for sorting and filtering the list by clicking the column header of the column that you want to use.

If the Alpha Search controls are available, you can do the following:

- Click a letter in the Alpha bar to show only records that begin with that letter.
- Enter characters in the text field, and click Go to filter the list to show only records beginning with those characters. You can use wildcards, see About Filter Values (on page 81).

Alpha Search is case insensitive and does not affect the Refine List search criteria.

Occasionally, the Alpha bar is not active; that is, its characters are not hyperlinks because the default sort order is based on a column that the Alpha bar does not work with. For example, the default sort order for the Deleted

Items page is based on the Type column, which is not sortable. Therefore, the Alpha bar is not active. However, if you click the Name column header, then the data is sorted, and the Alpha bar is activated.

Quick Filter Fields

With Quick Filter fields, you can filter the list to show records where a selected field meets particular filter criteria.

In the Show Results Where section of the List page, you select or enter values from left-to-right in the fields to specify respectively the search field, filter condition, and filter value (if the filter condition requires a value). The values available in the filter condition list vary according to the search field you select. For information about the filter conditions available, see About Filter Conditions (on page 77).

The filter value field changes to match the field type. For example, a calendar icon is displayed when you want to select a date, and a telephone icon is displayed when you want to specify a telephone number. The filter value field is hidden when no value is required with the filter condition. For text and telephone fields, you can use wildcards, see About Filter Values (on page 81).

You can use any of the fields that your company administrator makes available as search fields in the search layout for the record type for your user role to filter the list of records. If your company administrator does not make any search fields available in the search layout, then you cannot use the Quick Filter fields.

NOTE: If the search criteria for the list of records that you want to filter include a field that is not one of the search fields defined in the search layout for the record type for your user role, then you cannot use the Quick Filter fields.

Searches in Quick Filter fields do not affect the Refine List search criteria. Also, searches in Quick Filter fields are case-sensitive for most fields. However, some fields are always case-insensitive. These fields are shown in purple text.

TIP: When working with a list, you can refine the list so that searches in some additional fields are case-insensitive. When you select the Case Insensitive check box in the Refine List page and then run the list from the Refine List page, the fields that become case-insensitive are shown in blue text in the Quick Filter fields. However, after you navigate away from the list, the next time you open the list, the searches in all of the fields for the list are case-sensitive again, with the exception of the fields that are shown in purple text. For your private custom lists and for public custom lists that you create, you can select the Case Insensitive check box, and then save the list, so that the relevant fields are permanently case-insensitive.

To use Quick Filter fields to filter a list

1. Select a field in the drop-down list to the right of the label Show Results Where.
2. Select a condition from the filter condition drop-down list.
3. If required, enter a value in the filter value drop-down list.
4. Click Go.

Refining Lists Within List Pages

In many List pages, you can open the Refine List pane within the List page and then change the search criteria for the list without leaving the List page. You can also change the set of fields that is displayed in the List page.

To refine a list within a List page

1. In the List page, click the Toggle Refine List Pane icon:

2. In the Refine List pane, change the search criteria, the fields to be displayed, and the sort order to meet your requirements.

   For more information about refining lists, see Creating and Refining Lists (on page 130).

3 Click Run to refresh the list of records.
4 To close the Refine List pane, click the Toggle Refine List Pane icon again.

When refining lists within List pages, the following considerations apply:

- The Save button is not available within the Refine List pane. If you want to save the refined list after you run it, then you must select the Save List option from the Menu button in the title bar of the List page.
- You cannot change the record type that is searched. To search for a record of a different record type, you must open an existing list of records of that type or start a new search, for example, by clicking Advanced in the Search section of the Action bar.
- The following features are not available in the List page while the Refine List pane is open within the page:
  - The Quick Filter fields.
  - The Book selector. However, you can select a book in the Refine List pane.

About the Record Pane in List Pages

In many List pages, you can open a record in the record pane without navigating away from the List page. Within the record pane, you can work with the record, as long as you have the necessary access rights for the record. For example, you can do the following:

- View the record details.
- View the related information sections for the record.
- Edit the fields on the record and in the related information sections of the Detail page, if the inline edit functionality is enabled.
- Preview linked records, using the record preview functionality.
- Delete the record.

The record pane functionality is available in most lists of records in Oracle CRM On Demand. Certain lists do not support the record pane. If the record pane is supported for a list, and if there is at least one record in the list, then you see the Toggle Record Pane icon on the right-hand side of the title bar in the List page:

If a list does not support the record pane, then the Toggle Record Pane icon is not available in the List page.

NOTE: The record pane is not supported in any of the lists that you access through the administration pages in Oracle CRM On Demand.

Considerations That Apply When Working in the Record Pane

When working in the record pane, note the following points:

- **Customized code and custom Web applets.** Your administrator can use customized code and custom HTML head additions to customize pages in Oracle CRM On Demand. For example, your administrator might add a custom button to a record Detail page, or add a custom Web applet that contains customized code to the page. In some cases, such customizations might not work as expected when you work with the record in the record pane.
- **Updating and refreshing the record in the record pane.** If another user updates the record while you have it open in the record pane, then a message appears when you try to update the record. If that happens, then you must refresh the record in the record pane by clicking the row for the record in the list section of the page again.
- **Deleting records in the record pane.** If you delete the record in the record pane, then the record pane closes. The list refreshes, and the record is no longer available in the list.
- **Actions that navigate away from the List page.** In the record pane, if you click a link that opens another page in Oracle CRM On Demand, such as the Show Full List link in a related information section, or if you click a button to perform an action such as creating a new record, then a new page opens. The new page

replaces the List page. If you want to return to the list, then you can use the Back link to navigate back to the list.

- **List navigation and inline editing.** The following considerations apply to the list section of the page:
  - The navigation icons at the top or bottom of the list section that allow you to move to the next page, previous page, first page, or last page of the list are available when the record pane is open. However, if you have a record open in the record pane, and if you navigate to another page in the list, then the record closes. The record pane remains open.
  - You cannot edit fields inline in the list section of the page while the record pane is open.
  - The Alpha Search controls and the Quick Filter fields that you typically use to filter a list are not available while the record pane is open. If you want to filter the list, then you must close the record pane.
  - You cannot sort the list while the record pane is open. If you want to sort the list, then you must close the record pane.
  - You cannot change the number of records displayed in the List page while the record pane is open. If you want to change the number of records displayed in the List page, then you must close the record pane.

Related Topics

See the following topic for related information:

- Using the Record Pane in List Pages (on page 139)

Using the Record Pane in List Pages

This topic describes how to open and work with records in the record pane in List pages.

The following procedure describes how to open the record pane in a List page.

To open the record pane in a List page

- Click the Toggle Record Pane icon:

  The record pane opens. The first column of the list remains visible in the list section of the page.

The following procedure describes how to open a record in the record pane.

To open a record in the record pane in a List page

- In the list section of the page, click the row for the record that you want to open in the record pane.

  The record opens in the record pane. In the list section of the page, the first column of the list remains visible, and the row for the record that you opened is highlighted.

The following procedure describes how to show a different column in the list section of the page while the record pane is open.

To show a different list column in the list section of the page

- In the list header, click the Select Column to be Displayed icon (a down arrow within a circle), and then select the name of the column that you want to display.

  The column that you selected appears in the list section of the page. The row for the record that is currently open in the record pane is highlighted in the list.

The following procedure describes how to close the record pane.

To close the record pane

- Click the Toggle Record Pane icon.

  The record pane closes. The List page remains open.

Related Topics

See the following topic for related information:

- About the Record Pane in List Pages (on page 138)

Manage Lists Page

The Manage Lists page shows the filtered lists to which you have access for a specific record type. For each list, the page shows the list type (Public, Private, System, or Role Specific), the name of the user who created the list, the name of the user who last modified the list, and the date on which the list was last modified.

You can filter the set of lists that is displayed. The following predefined sets of lists are available in a drop-down list in the Manage Lists page:

- **All Lists.** All of the lists to which you have access for this record type. This set of lists is shown when you first open the page.
- **My Lists.** The lists that you created for the record type, including your private lists and any public or role-specific lists that you created.
- **System Lists.** The lists that are available for the record type in the standard application.
- **Lists in My List Order.** The lists that you see in the picklist of lists in List pages and in the set of predefined lists in Lookup windows for the record type.
- **Role Specific Lists.** The role-specific lists to which you have access for the record type.
- **Public Lists.** The public lists that were created for the record type.
- **Private Lists.** The private lists that you and other users created for the record type in your current user language.

  This predefined set of lists is available only if your user role has the Manage Private Lists privilege. Typically, the Manage Private Lists privilege is given to administrators only. For information about the considerations that apply when editing other users' private lists, see About Editing and Deleting Private Lists Created by Other Users (on page 135).

NOTE: Multiple lists with the same name can exist for a single record type. For example, you might create a private list that has the same name as an existing public list or role-specific list for the record type. In that case, both of the lists with the same name are shown when you view all lists for the record type in the Manage Lists page. Similarly, multiple users can create private lists with the same name; so, if your user role has the Manage Private lists privilege, then the Manage Lists page might show multiple private lists that have the same name, but were created by different users.

For some of the predefined sets of lists, you can use the quick filter fields to refine the set of lists.

NOTE: You can open the Manage Lists page by clicking the Manage Lists link in the Homepage for the record type, or by selecting Manage Lists from the Menu button in a List page for the record type. For more information about accessing list management options from List pages, see Working with Lists (on page 125).

From the Manage Lists page, you can perform the tasks shown in the following table.

To do this	Follow these steps
Add a list to your favorite lists	In the row for the list, click the Add to Favorites icon. **NOTE:** You cannot add a private list that was created by another user to your favorite lists, even if your user role has the Manage Private Lists privilege.

To do this	Follow these steps
Remove a list from your favorite lists	In the row for the list, click the Remove from Favorites icon.
Change the set of lists that appears on the record Homepage and in picklists of lists	For information about changing sets of lists, see Changing Sets of Lists for Record Types (on page 142).
Create a filtered list	In the Manage Lists title bar, click New List. On the New List page, enter the required information, and save the record.
Delete a list	In the row for the list that you want to delete, click Delete. You can delete any list that you created. In addition: ■ If your user role has the Manage Public Lists privilege, then you can delete public lists and role-specific lists, regardless of who created them. ■ If your user role has the Manage Private Lists privilege and the Delete Private Lists privilege, then you can delete private lists that were created by other users.
Page through the list of lists	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Update a list	In the row for the list you want to update, click Edit. This opens the Refine List page, where you can update the list. **NOTE:** You cannot change the standard filtered lists distributed with the application, or the filtered lists saved before the updating capability became available.
View the key information and filter information for a list	In the row for the list, click View. This action opens the View List page.

View List Page

The View List page displays the following information:

- **Key list information**. The name and description of the list and also:
  - **List accessibility**. The visibility of the list indicating whether it is private, public, or specific to a user role.
  - **Search In**. The subset of records that are searched to filter the list.
- **Filter information**. The fields, filter conditions, and filter values used to produce the filtered list.
- **Selected Fields**. The fields selected to display as columns in the search results, and the sort order of the field selected as the default search field.

You access the View List page by selecting Show List Filter from the Menu button on a list page. For more information about accessing list management options, see Working with Lists (on page 125).

Changing Sets of Lists for Record Types

Your company administrator can determine which lists are available for your user role. You can also create custom lists for your own use, for more information, see Creating and Refining Lists (on page 130). From the lists that are available to you for a top-level record type, you can choose a set of lists that is shown in the following locations:

- In the Homepage for the record type, if the record type has a Homepage. The Homepage shows a maximum of the top ten lists from your set of lists for the record type.
- In the picklist of lists in List pages for the record type.
- In the *record type* List field in Lookup windows for the record type, where *record type* is the name of the record type that you are searching for in the Lookup window.

  The availability of the *record type* List field in Lookup windows is controlled by the Record-Type Lists in Lookup Windows menu in the company profile. For more information about this menu and what it controls, see Searching for Records in Lookup Windows (on page 101) and Setting Up Your Company Profile and Global Defaults (on page 1123).

  NOTE: If the *record type* List field is available in Lookup windows, then the first list in the set of lists in the *record type* List field is active by default when a Lookup window opens. If some context-sensitive lists are available in the Lookup window, and the search layout for your user role specifies that the context-sensitive lists appear at the top of the set of lists in the *record type* List field in the Lookup window, then the first available context-sensitive list is active by default when the Lookup window opens. If the *record type* List field is not available in Lookup windows, then the initial search for a record of a given record type in a Lookup window is performed on all records of that record type that you can access.

In addition to choosing a set of lists for a record type, you can also determine the order of the lists within the set. It is recommended that you place the lists that you use most often at the top of your set of lists.

To change your set of lists for a record type

1. Open a list of records of the record type. For information about opening lists, see Working with Lists (on page 125).
2. In the title bar of the List page, click Menu, and then select Manage Lists.
3. In the Manage Lists page, click List Order.
4. In the List Display Order page, do the following:
   - To add a list to the set of lists, use the directional arrow to move the list from the Available Lists section to the Lists to Appear on Homepage section.

     NOTE: Lists that remain in the Available list do not appear on the Homepage, in the picklist of lists in List pages, or in the set of predefined lists in Lookup windows.

   - To remove a list from the set of lists, use the directional arrow to move the list from the Lists to Appear on Homepage section to the Available Lists section.
   - To change the order of the lists within the list set, use the directional arrows to move the lists up or down in the Lists to Appear on Homepage section.

   TIP: Remember that the lists that you want to appear on the Homepage for the record type must be in the top ten lists in the Lists to Appear on Homepage section. However, all of the lists in the Lists to Appear on Homepage section are available in the set of predefined lists in Lookup windows.

5. Save your changes.

NOTE: When you create a custom list, you might want to update your set of lists to move the new list to a different location in the set of lists or to remove it from the set of lists.

Favorite Lists Page

When you click the Show Full List link in the Favorite Lists section of the Action Bar, the Favorite Lists page opens, showing your favorite lists. You can have a maximum of 100 lists in your favorites.

NOTE: If there are already 100 lists in your favorites, and you add another list to your favorites, then the list that has been in your favorites for the longest is dropped from your favorites to allow the new list to be added.

The following table describes the tasks that you can perform from the Favorite Lists page.

To do this	Follow these steps
Change the sequence of the lists	In the Favorite Lists title bar, click the Manage Favorites button. On the Manage Favorites page, change the order of the lists until it reflects the sequence that you want. The lists appear in the new sequence on the Action bar and the Favorite Lists page.
Delete a list from the list of favorites	In the row for the list that you want to delete, click the Remove link. **TIP:** You can also remove a list from your favorite lists by opening the list and then clicking the Remove from Favorites icon, which is available in the right-hand side of the title bar in the List page.
Display a list	Click the name of the list to display the List page from which you can work with the list.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.

You can embed Favorite Lists as a Web widget in other applications. For more information, see Embedding a Favorite Lists Widget (on page 767).

Counting Records in Lists

The following procedure describes how to count the records in a list.

To count the records in a list

- On the record List page, click Menu, then select Record Count.

NOTE: If there are more than 1000 records in the list, then the count operation fails, and a message is displayed indicating that too many records match your search criteria. If this happens, refine your list so that fewer records are returned. If the count operation takes more than 30 seconds, then the operation fails. If this happens, try again later, or refine your list so that fewer records are returned. For more information about refining lists, see Creating and Refining Lists (on page 130).

Exporting Records in Lists

You can export the records that meet the criteria you set up in a list. After Oracle CRM On Demand exports the list of records, you can save it by downloading the file.

You can export up to 250 records from a list immediately. When you select this option, the top records from the list (based on the current sort order of the list) up to a maximum of 250 are exported. Or, you can export all of the records in a list. When you export all of the records in a list, your export request is queued and executed as a batch job.

NOTE: In the standard application, there is no limit to the number of records that you can export in a list. However, your administrator can restrict the number of records that you can export at one time by entering a value in the Maximum Number of Records per List Export field in your user role. If a restriction is specified for your role, then you cannot export more than the allowed number of records, either through an immediate export or through an export request that is executed as a batch job. For example, if your role specifies that you can export a maximum of 100 records at one time, then the top records from the list (based on the current sort order of the list) up to a maximum of 100 are exported.

To export records from a list, your user role must include either the List - Export All Fields privilege or the List - Export Displayed Fields privilege. When you export a list of records, your user role determines which fields you can export, as follows:

- If the List - Export All Fields privilege is enabled on your user role, then you can choose to export all of the fields on the records, or to export only the fields that are displayed in your list.
- If the List - Export Displayed Fields privilege is enabled on your user role, but the List - Export All Fields privilege is not enabled, then you can export only the fields that are displayed in your list.

The following procedure describes how to export up to 250 records in a list.

To export up to 250 records in a list

1. Open the list of records that you want to export.
2. If necessary, sort the list so that the records that you want to export appear at the top of the list.

   TIP: To sort the list by column, click the column heading. To sort the list by the same column but in reverse order, click the column heading again.

3. On the record List page, click Menu, and select Export List.
4. On the Export List page:
   - In the List Export Type section, select the Immediate Export option.
   - In the Fields to Export and Field Delimiter sections, select the options that you want.

     NOTE: The Fields to Export section is available only if your user role has the List - Export All Fields privilege.

5. Click Export.
6. Click Download to download the file.

NOTE: If you select Immediate Export in the List Export Type section, then no email notification is sent when the export process is complete.

The following procedure describes how to export all of the records in a list.

To export all of the records in a list

1. Open the list of records that you want to export.
2. On the record List page, click Menu, and select Export List.
3. On the Export List page:
   - In the List Export Type section, select the Queued Export option.
   - In the Fields to Export and Field Delimiter sections, select the options that you want.

     NOTE: The Fields to Export section is available only if your user role has the List - Export All Fields privilege.

- Select the Enable Email Notification (applicable to Queued Export only) check box if you want an email notification to be sent after the export process is complete.

  NOTE: This check box is selected by default and is only applicable if you perform a queued export.

- Select the Include Weblink URL in Export Files check box if you want URLs to be included in the exported CSV file.

  The default value of the Include Weblink URL in Export Files check box is controlled by the Include Weblink URL in Export Files check box in the company profile. You can choose to select or to deselect this setting for each export request. For more information about this check box, see Configuring Integration Settings (on page 1144).

4. Click Export.

   The Personal Export Request Queue page appears.

5. If the export request is in the Pending Requests section of the page, click Refresh to see if your update request has completed.
6. When your export request appears in the Completed Requests section of the Personal Export Request Queue page, click the List or Record Type link to open the List Export Request Detail page.
7. In the Export Request Attachment section of the page, select Download from the record-level menu for the attachment, and then save the ZIP file.

   The ZIP file consists of an export summary text file and a CSV file containing the records that you exported.

Details of the export request are available in your Personal Export Request Queue page until the retention period that is specified for export requests for your company expires. The ZIP file containing the output from the export request is available through your Personal Export Request Queue page until the retention period that is specified for export request attachments for your company expires. For more information about the Personal Export Request Queue page, see Viewing Your Export Requests (on page 762).

Transferring Ownership of Records

You own a record when your name is in the Owner field. Typically, you can view and edit all records that you own.

Depending on the record ownership mode that your company administrator configures for a record type, you might automatically become the owner of a record when you create the record. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

You also become the owner of a record when any of the following happens:

- The record is assigned to you.
- You are in a group that owns the record. With group ownership, your name might not appear in the Owner field.

You can transfer the ownership of most records if:

- You own the record.
- One of your direct reports owns the record.
- Your user role and access levels permit it.

NOTE: For account, contact, and opportunity records only, you can also transfer the ownership if the record owner has granted you full-access rights to that record.

To transfer ownership of a record

1. Select the record.

   For instructions on selecting records, see Finding Records (on page 74).

2. On the Detail page, click Edit to open the Edit page.

NOTE: If the inline edit feature is enabled for your company, you do not have to open the Edit page. Instead, you can edit the Owner field directly on the Detail page.

3. Click the Lookup icon next to the Owner field.
4. In the Lookup window, click the Last Name link of another employee.
5. Save the record.

Sharing Records (Teams)

For some record types, you can share a record so that a team of users can view it. The following record types can be shared by teams:

- Account
- Accreditation
- Activity
- Application
- Business Plan
- Certification
- Contact
- Course
- Custom Objects
- Deal Registration
- Event
- Exam
- Household
- Lead
- MDF Request
- Objective
- Opportunity
- Order
- Partner
- Portfolio
- Sample Request
- Service Request
- Special Pricing Request

With account records, you can also share the contact and opportunity records that are linked to that account record.

About Teams and Record Ownership Modes

Depending on the record ownership mode that your company administrator sets up for the record type, a record might not have an owner. The record might instead have a primary custom book or might have no owner or primary custom book. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47). Record ownership modes apply only to record types that support books.

If your company administrator changes the record ownership mode for a record type, then a record that previously had an owner might have the owner removed from the record the first time that the record is updated after the record ownership mode changes. When this happens, all the members of the team, except the former owner of the record, remain as members of the team. The behavior is the same for team members who are members of a predefined group; that is, all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a predefined group, then all of the members of the group are removed from the team. Any team members who are not members of the predefined group remain as members of the team, as is the case with other record types.

NOTE: In the standard application, the former owner of the record is not retained as a member of the team, as described here. However, your administrator can configure the record type so that the former owner of the record is retained as a member of the team on the record. For information about configuring a record type to retain the former owner as a member of the team, see Customizing Previous Ownership for Shared Records (see Customizing Previous Ownership for Shared Records on page 1355).

To share a record, you first add the person to the Team for the selected record. Then you specify the access profile for the user for that record.

NOTE: You add users to an activity team in the Users related information section in the activity Detail page. When you add a user to an activity team, you cannot specify the access profile for the user for the activity record. The user is automatically given the ReadOnly access profile for the activity. The user whose name appears in the Delegated By field on an activity is automatically given the Full access profile for the activity. The access level that the user has to the record depends on how the access profile is configured. However, regardless of how the ReadOnly access profile is configured, only the activity owner and the user whose name appears in the Delegated By field on an activity can remove users from that activity. For more information about adding users to activities, see Scheduling Appointments with Others (on page 218).

The following procedure describes how to add one or more team members to a single record. If your user role has the Batch Assign Team Members privilege, then you can also submit a batch request to assign a team member to a list of records or remove a team member from a list of records. The batch assign functionality is supported for all of the record types that support teams, with the exception of the Activity record type. For information about assigning a team member to a list of records, see Assigning a Team Member to a List of Records (on page 148).

To share a record

1. Select the record.

   For instructions on selecting records, see Finding Records (on page 74).
2. On the record Detail page, scroll down to the Team section and click Add Users.
3. In the Team Add User window, click the Lookup icon next to User.
4. In the Lookup window, select an employee.
5. Set roles and access levels:

   NOTE: Depending on the record type and setup, your application might differ from these options.

   a. (Optional) To explain the role the linked record plays in relation to the main record, select an option from the Team Role drop-down list.
   b. To set the access rights for the record type for team members, select an access profile from the Access drop-down list. The access profiles that are available by default are as follows:

      - **ReadOnly.** In the standard application, this access profile allows users to view records but not change them.
      - **Edit.** In the standard application, this access profile allows users to update records.
      - **Full.** In the standard application, this access profile allows users to update or delete records.

      NOTE: Administrators can change the access settings on the default access profiles.

      Your company administrator can make other access profiles available for teams.

      NOTE: Your managers have owner access to the records of their subordinates regardless of the setting of the Manager Visibility Enabled option on the company profile and regardless of your selections in the Access drop-down list. For any user, the most liberal access that is set in the application is the one that determines the access level for that user. For more information about access profiles, see Access Profile Management (on page 1403).

6 Click Save.
7 (Opportunity teams only) To allocate part or all of the revenue on the opportunity to a team member, do the following:
   a In the Opportunity Detail page, in the Opportunity Team section, click Edit Users.
   b In the Opportunity Team Edit Users page, in the Percentage Split field, enter the percentage of the value that is to be allocated to the team member.

   The value in the Percentage Split field can be any number from 0 (zero) to 100.

   NOTE: The Split Revenue field is a read-only field that is calculated from the Percentage Split field on the opportunity team record and the Revenue field on the opportunity record.

   c Click Save.

Related Topics

See the following topic for related information about opportunity teams:

- About Opportunity Teams (on page 325)

Assigning a Team Member to a List of Records

You can submit a batch request to assign a team member to a list of records or remove a team member from a list of records. The batch assign functionality is supported for all of the record types that support teams, with the exception of the Activity record type. For a list of the record types that support teams, see Sharing Records (Teams) (on page 146).

NOTE: You cannot use the batch assign functionality to change the access profile for an existing member of a team on a record.

Before you begin:

- To assign a team member to a list of records or remove a team member from a list of records, your user role must have the Batch Assign Team Members privilege.
- If necessary, create a list to capture the records to which you want to add a team member or from which you want to remove a team member. For information about creating and using lists, see Working with Lists (on page 125).
- In the standard application, the ReadOnly, Edit, and Full access profiles are available for you to assign to the team member for the records in the list. If you want to assign a different access profile to the team member for the records, then make sure that the Grantable to Team Members check box is selected on the access profile that you want to assign. For more information about the access profiles that you can assign to team members, see Sharing Records (Teams) (on page 146). For more information about setting up access profiles, see Process of Setting Up Access Profiles (on page 1416).

The following procedure describes how to assign a team member to a list of records.

To assign a team member to a list of records

1 Open the list of records.
2 In the List page, click Menu, and then select Batch Assign Team Member.
3 In the Batch Assign Team Member page, click the Lookup icon (magnifying glass) for the Target User field.
4 In the Search for a User window, select the user that you want to assign as a team member.
5 Select the Add radio button.
6 In the Access Profile field, select the access profile for the team member for the records in the list.

7 Click Assign.

The Batch Assign Request Queue page opens, showing your request in the Active Requests section. For information about the Batch Assign Request Queue page, see Batch Assign Request Queue Page (on page 1846).

When your request has been processed, you will be notified by email.

The user that you select is not added to a record if one or more of the following are true for that record:

- The user is already a member of the team on the record. In this case, the user's membership of the team, and the access profile for the user's membership of the team for that record, remain unchanged.
- Your access to the record does not allow you to add a team member to the record.

The log for the batch assign request shows details of any records that are not updated.

The following procedure describes how to remove a team member from a list of records.

To remove a team member from a list of records

1. Open the list of records.
2. In the List page, click Menu, and then select Batch Assign Team Member.
3. In the Batch Assign Team Member page, click the Lookup icon (magnifying glass) for the Target User field.
4. In the Search for a User window, select the user that you want to remove from the team.
5. Select the Remove radio button.
6. Click Assign.

   The Batch Assign Request Queue page opens, showing your request in the Active Requests section.

When your request has been processed, you will be notified by email.

The user that you select is not removed from a record if one or more of the following are true for that record:

- The user is the owner of the record.
- The user and the owner of the record are both members of the same user group.
- (Lead record type only) The user is the sales person for the record, that is, the user's name appears in the Sales Person field on the record.
- Your access to the record does not allow you to remove a team member from the record.

The log for the batch assign request shows details of any records that are not updated.

Changing the Primary Custom Book on a Record

Depending on the record ownership mode that your company administrator configures for a record type, a record of that type might have a primary custom book associated with the record instead of having a record owner. You can change the primary custom book on a record. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

To change the primary custom book on a record

1. On the record Detail page, in the Book field, click the Lookup icon.
2. In the Lookup window, find the custom book that you want to associate with the record, and then click Select.

   NOTE: Only books that can contain data can be associated with a record.

   The custom book that was formerly the primary book on the record is removed from the record. If you want the custom book to be associated with the record, then you must add the book to the record in the Book section of the record Detail page.

NOTE: You cannot edit the Primary check box on a custom book record in the Book related information section on a record Detail page.

Updating Groups of Records

Many top-level record types support the Mass Update feature, which enables you to update the values in fields for a group of records at the same time. For example, you might want to change the ownership of a batch of records to a different employee. You can do this by updating groups of records.

NOTE: Certain record types that are specific to Oracle CRM On Demand Life Sciences Edition do not support the Mass Update feature, including the Message Response, Messaging Plan, Messaging Plan Item, Messaging Plan Item Relations, Inventory Audit Report, Inventory Period, Sample Disclaimer, Sample Transaction, and Transaction Item record types.

For the record types that support the Mass Update feature, you can update values in up to 100 selected records at a time. If there are more than 100 records in the list, then you can repeat the task until all of the records are updated. Or, you can further refine your list so that only the records that you want to update are present in the list.

When updating groups of records, the following considerations apply:

- To update a group of records, your user role must have at least one of the following privileges: Mass Update Any Field, or Mass Update Editable Fields Available on the Page Layout. If your user role does not have at least one of these privileges, then you cannot use the Mass Update feature.

  If your user role has the Mass Update Editable Fields Available on the Page Layout privilege and does not have the Mass Update Any Field privilege, then the set of fields that you can update through the Mass Update feature is restricted. You can update only the fields that are editable for you on the Detail page layout that is assigned to your user role for the record type. For record types that have a dynamic layout, you can update only the fields on a record that are editable for you on the Detail page layout that applies to that record.

  If your user role has the Mass Update Any Field privilege, then the set of fields that you can update through the Mass Update feature is not restricted, regardless of whether your user role also has the Mass Update Editable Fields Available on the Page Layout privilege, and regardless of whether the Detail page layout is static or dynamic.

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

- If the Detail page layout that is assigned to your user role for the record type that you are updating is a dynamic layout, then some fields might be required for some records in the list, and not required for other records. Similarly, some fields might be editable for some records in the list, and read-only for other records. In addition, if you change the value in the driving picklist field for the dynamic layout as part of the mass update operation, then some fields that were not required might become required, and some fields that were editable might become read-only. The mass update operation fails for a record in the following circumstances:
  - If you update a field that is required on the layout for the record to a null value.
  - If you update a field that is read-only on the layout for the record.
- If you use the Mass Update feature to change the value in the Sales Stage field on one or more opportunity records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage. If you want the probability percentage on the opportunities to change when the sales stage is updated, then you must change the sales stage on each record individually or by using Web services. For information about Web services, see Web Services Integration (on page 1838).
- You cannot update individual address fields on records, such as accounts, contacts, leads, and so on, through the Mass Update feature. However, if your company uses shared addresses, then you can update the fields on top-level address records. For more information on shared addresses, see Addresses and Sharing Addresses Between Account, Contact, Dealer, and Partner Records (on page 345).

NOTE: You can use the Mass Update feature to update the values in fields in a group of product revenue records linked to an opportunity at the same time. For information about updating the values in a group of opportunity product revenue records, see Linking Products to Opportunities (on page 316).

Before you begin:

- If necessary, create a list to capture the records that you want to update. For information about creating and using lists, see Working with Lists (on page 125).
- To update a group of records, your user role must have at least one of the following privileges: Mass Update Any Field, or Mass Update Editable Fields Available on the Page Layout.
- For information about the values that are available for selection when you update the Sales Stage field on opportunity records, see About Sales Stages and the Mass Update Feature (on page 325).

The following procedure describes how to update selected records in a list.

To update selected records in a list

1. Open the list of records that you want to update.

   NOTE: When you use the Mass Update functionality, only the records that are displayed in the List page are available for you to update. For example, if you display only 10 records in your List page, then only those 10 records are available for you to update. You can display a maximum of 100 records in the List page.

2. If necessary, sort the list so that the records that you want to update appear at the top of the list.

   TIP: To sort the list by column, click the column heading. To sort the list by the same column but in reverse order, click the column heading again.

3. On the record List page, click Menu, and select Mass Update.
4. In Step 1, clear the check box for records you do not want to update, and then click Next.

   NOTE: By default, the check box is selected for each of the records to which you have edit access. If you do not have edit access to a record, then the check box for that record is deselected, and you cannot select it.

5. In Step 2, select the fields that you want to update, and enter new values for those fields.

   You can select up to five fields to update to new values. To remove existing values from a field, leave the Value column blank in Step 2.
6. Click Finish.

Merging Records

For certain record types, if you have duplicate records, you can merge up to five records of the same record type into one record at one time. For a list of the record types that support the merge functionality, see Support for the Merge Functionality (on page 154).

NOTE: For information about what happens when you merge divisions, see About Merging Divisions and Deleting Divisions (on page 1172).

When you merge two or more records, you specify the field values from the records that you want to keep in the record that you retain, which is called the *primary record.* The records that are deleted are called the *duplicate records*.

The following considerations apply to the merging of records:

- If a field has the same value on the primary record and on all of the duplicate records, and if the field is required, then you cannot change the value in that field during the merge operation. However, if the field is not required, then you can select a blank value instead of the existing value in the field.
- In fields that are updated by the system, the value defaults to the value from the primary record during the merge operation, and you cannot change the value.

- In a multi-select picklist field, you can specify which set of values you want to keep. The following options are available for you to select during the merge operation:
  - The set of values from the primary record.
  - The set of values from each of the duplicate records.
  - A set of values that includes the values from all of the records, up to a maximum of 10 values. Each value is included only once, even if that value appears in the set of values on two or more records.
  - A blank value, if the field is not required.
- If your company uses shared addresses, then you cannot select the individual fields in the billing, shipping, and primary addresses that are to be retained when you merge two or more accounts, or dealers, or partners, or contacts. For more information about address fields on accounts, contacts, and partners, see Account Fields: Import Preparation (on page 1661), Contact Fields: Import Preparation (on page 1700), Dealer Fields: Import Preparation, and Partner Fields: Import Preparation (on page 1780). For more information about shared addresses, see Addresses.

When you merge the records, the following happens:

- Any custom books that are linked to the primary record are always retained, but any custom books that are linked to the duplicate records are not automatically linked to the primary record. However, your administrator can enable an option on the company profile to allow you to link the custom books to the primary record automatically when you merge the records. For more information, see About Retaining Linked Custom Books When Merging Records (on page 156).

  The links to the custom books are never removed from the duplicate records during a merge operation, even if you select the option to link those books to the primary record. If you later restore a deleted duplicate record, then the custom books are still linked to the record.
- For the record types that support teams, the team members on the duplicate records are automatically linked to the primary record, but they are not removed from the duplicate records. If you later restore a deleted duplicate record, then the team members are still linked to the record. In the Team related information section on the primary record, the record-type access for the users who were the owners of the duplicate records is set to Merged Owner. The Merged Owner access level gives the user owner access to the primary record.

  NOTE: After the records are merged, you can change the access level for these users. However, after you change the access level, you cannot change it back to Merged Owner again.
- If your company uses shared addresses, then the following happens:
  - When you merge two or more contacts, the primary address of the primary contact is retained, if it exists. The primary addresses of the duplicate contacts, as well as any other addresses that are linked to the duplicate contacts, are automatically linked to the primary contact and removed from the duplicate contacts. If the primary record does not have a primary address, then the duplicate records are checked to see if a primary address exists on any of those records. If a primary address is found on one of the duplicate records, then that address becomes the primary address on the primary contact. The duplicate records are checked in the order in which they were added to the merge operation. After a primary address is found on a duplicate record, the remaining duplicate records are not checked for a primary address.

    If neither the primary contact nor any of the duplicate contacts has a primary address, then the first linked address that is found on a duplicate contact (if one is found) becomes the primary address on the primary contact.

    If you later restore a deleted duplicate contact, then none of the addresses that were linked to the duplicate contact before the merge operation, including the primary address, are available.
  - When you merge two or more accounts, or dealers, or partners, the billing and shipping addresses of the primary record are retained, if they exist. If the primary record does not have a billing address, then the duplicate records are checked to see if a billing address exists on any of those records. If a billing address is found, then that billing address is copied to the primary record. Similarly, if the primary record does not have a shipping address, then the duplicate records are checked to see if a shipping address exists on

any of those records. If a shipping address is found, then that shipping address is copied to the primary record. The duplicate records are checked in the order in which they were added to the merge operation. After a billing or shipping address is found, the remaining duplicate records are not checked for an address of that type.

With the exception of the billing and shipping addresses on accounts, dealers, and partners, all other addresses that are linked to a duplicate record are automatically linked to the primary record and removed from the duplicate record.

If you later restore a deleted duplicate account, dealer, or partner, then the billing and shipping addresses are available on the record (if they existed before the merge operation), but the links to any other addresses are not restored.

- If your company does not use shared addresses, then the following happens:
  - When you merge two or more contacts, all of the addresses that are linked to a duplicate contact are automatically linked to the primary contact and removed from the duplicate contact. If the primary record did not have a primary address before the merge operation, then the first address that is linked to the primary record during the merge operation becomes the primary address on the primary contact. If you later restore a deleted duplicate contact, then none of the addresses that were linked to the duplicate contact, including the primary address, are available.
  - When you merge two or more accounts, or dealers, or partners, the billing and shipping addresses on the duplicate records are not copied or linked to the primary record and are not removed from the duplicate records.

    With the exception of the billing and shipping addresses on accounts, dealers, and partners, all other addresses that are linked to a duplicate record are automatically linked to the primary record and removed from the duplicate record.

    If you later restore a deleted duplicate account, dealer, or partner, then the billing and shipping addresses are available on the record (if they existed before the merge operation), but the links to any other addresses are not restored.
- With the exceptions described earlier for custom books, teams, and addresses, and the exceptions described in About Merging Divisions and Deleting Divisions (on page 1172), all of the records that are linked to a duplicate record are automatically linked to the primary record and removed from the duplicate record before it is deleted. If you later restore a deleted duplicate record, then the links from that record to other records are not restored and the related information sections of the restored record are empty. This is true even if the primary record and the duplicate record were both linked to the same record before the merge operation.

  In most cases, Oracle CRM On Demand does not check for duplicate related records when the records that were linked to the duplicate record are linked to the primary record. To remove duplicate related records you must delete them. However, in the case of opportunities that are linked to accounts, Oracle CRM On Demand does not link an opportunity from a merged account to the primary account if the opportunity has the same Opportunity Name and Primary Contact ID as an opportunity that is already linked to the primary account.
- If there are more than 9999 records of any record type linked to any one of the records that you want to merge, then the merge operation will not complete successfully. Also, if there are large numbers of records of any type linked to any of the records that you want to merge, then the merge operation might time out, even if the number of linked records of any one record type does not exceed 9999. Other factors can also cause a merge operation to time out, such as the types of records that are involved in the merge operation, the speed of your network, and the load on the Oracle CRM On Demand database and the Oracle CRM On Demand server. You can work around these issues by doing the following:
  - Unlink some of the linked records from the parent record as necessary before you merge the parent records.
  - Perform merge operations during off-peak hours.

Before you begin:

- To perform this procedure, your user role must include the Merge Records privilege. To merge records of the Division record type, your user role must also include both the Manage Users privilege and the Manage Roles and Access privilege.
- At least one of the following conditions must be met:
  - Your access level for the primary record and your access level for each of the duplicate records allows you to delete the record.
  - Your user role includes the Merge Records Without Delete Access privilege.

  If your access level for the primary record does not allow you to delete the record, and if your user role does not include the Merge Records Without Delete Access privilege, then the Merge button is not available on the record.
- Note the record names so that you can select them during the merge.

To merge records

1. Select the record you want to retain as the primary record.

   For instructions on selecting records, see Finding Records (on page 74).
2. On the record Detail page, click the Merge button.
3. In Step 1, click the Lookup icon, and select the first duplicate record.
4. (Optional) To select an additional duplicate record, click the plus icon (+) and then click the Lookup icon.

   You can select a maximum of four duplicate records for the merge operation in addition to the primary record.
5. In Step 2, review the values for each record, and select the values to save with the record.

   The Value to Save column displays the values from the primary record by default.
6. In Step 3, if you want the books that are linked to the duplicate records to also be linked to the primary record when the records are merged, then select the check box.

   NOTE: Step 3 appears only if the Enable Merge of Duplicate Record's Books check box is selected on the company profile. If Step 3 does not appear, or if you do not select the check box in Step 3, then any books that are linked to the duplicate records are not automatically linked to the primary record when the records are merged. For more information, see About Retaining Linked Custom Books When Merging Records (on page 156).
7. Click Finish.

Support for the Merge Functionality

The following record types support the merge functionality, which allows you to merge up to five records of the same record type into one record at one time:

- Account
- Accreditation
- Address
- Allocation
- Application
- Asset
- Broker Profile
- Business Plan
- Campaign
- Certification
- Claim
- Contact

- Contact State License
- Course
- Coverage
- Custom Objects 01 through 40
- Damage
- Deal Registration
- Dealer
- Event
- Exam
- Financial Account
- Financial Account Holder
- Financial Account Holding
- Financial Plan
- Financial Product
- Financial Transaction
- Fund
- Fund Request
- HCP Contact Allocation
- Household
- Insurance Property
- Involved Party
- Lead
- MDF Request
- Message Plan
- Message Plan Item
- Message Plan Item Relations
- Objective
- Opportunity
- Partner
- Partner Program
- Plan Account
- Plan Contact
- Plan Opportunity
- Policy
- Policy Holder
- Portfolio
- Product Indication
- Sample Disclaimer
- Sample Request
- Sample Transaction
- Service Request
- Solution
- Special Pricing Request
- Vehicle

About Retaining Linked Custom Books When Merging Records

When you merge two or more records, any custom books that are linked to the primary record are always retained, but any custom books that are linked to the duplicate records are not automatically linked to the primary record. This means that if a user has access to a duplicate record through membership of a custom book that is linked to the duplicate record, and if the user does not have access to that duplicate record or the primary record through any other access-control component, then that user will not have access to the primary record after the records are merged unless you manually link the appropriate book to the primary record after you merge the records.

However, if your administrator selects the Enable Merge of Duplicate Record's Books check box on the company profile, then when you merge two or more records, an additional step in the merge operation provides the option to link the custom books from the duplicate records to the primary record.

Record Ownership Modes and Merging Records

If you select the option to link the custom books from the duplicate records to the primary record when you merge two or more records, then the record ownership mode that is configured for the record type determines which custom books are linked to the primary record after you merge the records, as described in the following sections.

User Mode

If the record type is configured in User mode, then the following happens after you merge the records:

- The Book field on the primary record shows the user book for the owner of the primary record.
- All of the custom books that were linked to the duplicate records are linked to the primary record in the Books related information section on the primary record's Detail page.
- All of the custom books that were linked to the primary record continue to be linked to the primary record in the Books related information section of the primary record's Detail page.
- The links to the custom books are not removed from the duplicate records. If you later restore a deleted duplicate record, then the custom books are still linked to the record.

Book Mode

If the record type is configured in Book mode, then the following happens after you merge the records:

- The custom book that you select in the Book field in Step 2 of the merge operation becomes the primary book for the primary record. If you select the book from the primary record, then the primary book from each of the duplicate records is linked to the primary record in the Books related information section of the primary record's Detail page. However, if you select a book from a duplicate record as the primary book, then the book that was the primary book for the primary record is not automatically linked to the primary record.
- All of the custom books that were linked to the duplicate records are linked to the primary record in the Books related information section of the primary record's Detail page.
- All of the non-primary custom books that were linked to the primary record continue to be linked to the primary record in the Books related information section of the primary record's Detail page.
- The links to the custom books are not removed from the duplicate records. If you later restore a deleted duplicate record, then the custom books are still linked to the record.

Mixed Mode

If the record type is configured in Mixed mode, then the following happens after you merge the records:

- If the primary record and the duplicate records all have an owner assigned to them, then the behavior is the same as the behavior when the record type is configured in User mode.
- If the primary record and the duplicate records all have a primary custom book assigned to them, then the behavior is the same as the behavior when the record type is configured in Book mode.
- If the primary record has an owner assigned to it, and if one or more of the duplicate records have a primary custom book assigned to them, then the following happens after the records are merged:

- The book that you select in the Book field in Step 2 of the merge operation is shown in the Book field of the primary record after the records are merged. If you select a custom book from a duplicate record, then that custom book becomes the primary book for the primary record and the Owner field on the primary record is not populated.

  If you select the user book from the primary record or a user book from a duplicate record, then that user becomes the owner of the primary record and the Book field of the primary record shows the user book for the owner of the primary record. The primary record has no primary custom book assigned to it.
- All of the custom books that were linked to the duplicate records, including any custom book that was the primary book on a duplicate record, are linked to the primary record in the Books related information section of the primary record's Detail page.
- All of the custom books that were linked to the primary record continue to be linked to the primary record in the Books related information section of the primary record's Detail page.

- If the primary record has a primary custom book assigned to it and one or more of the duplicate records have an owner assigned to them, then the following happens:
  - The book that you select in the Book field in Step 2 of the merge operation is shown in the Book field of the primary record after the records are merged. If you select the primary custom book from the primary record or a custom book from a duplicate record, then that custom book becomes the primary custom book for the primary record and the Owner field on the primary record is not populated.

    If you select a user book from a duplicate record, then that user becomes the owner of the primary record and the Book field on the primary record shows the user book for that user. The primary record has no primary custom book after the records are merged. The custom book that was the primary book for the primary record is not automatically linked to the primary record after the records are merged.
  - All of the custom books that were linked to the duplicate records are linked to the primary record in the Books related information section of the primary record's Detail page.
  - All of the non-primary custom books that were linked to the primary record continue to be linked to the primary record in the Books related information section of the primary record's Detail page.
  - The links to the custom books are not removed from the duplicate records. If you later restore a deleted duplicate record, then the custom books are still linked to the record.

About the Information in the Links to Custom Books

If a custom book is linked to the primary record as well as a duplicate record before you merge the records, then the information in the link to the book from the primary record is retained after the records are merged, including the setting in the Automatic Association check box. If a custom book is linked to a duplicate record and is not linked to the primary record before you merge the records, then the following happens when the custom book is linked to the primary record after the records are merged:

- The Automatic Association check box in the link to the primary record is not selected, even if the Automatic Association check box was selected in the link to the duplicate record.
- The Start Date and End Date fields in the link to the primary record are populated with the information from the corresponding fields in the link to the duplicate record, or are left blank if they were not populated in the link to the duplicate record.

Related Topics

For more information about record ownership modes, see the following topic:

- About Data Access, Record Sharing, and Record Ownership (on page 47)

Adding Notes

For record types that support the notes feature, you can add a note in two ways:

- By clicking the note icon at the top-right of the record Detail page. This is available if the Message Center is enabled for your company. With this method you can add notes to a list of notes for the record, and subscribe to notes that are added to the record.
- By clicking New in the Notes section.

Typically, if your company administrator has made the note icon available, the Notes section will not be available. However, if the Notes section is present, notes that you add to the list of notes are also added to the Notes section.

For more information about the Message Center, see Working with the Message Center (on page 43). For more information about using the list of notes, see Working with the List of Notes (on page 160).

The method used to create a note makes no difference to the access permissions to the note.

To add a note using the note icon

1. Select the record.

   For instructions on selecting records, see Finding Records (on page 74).
2. On the Detail page, click the note icon.
3. Click New Note.
4. On the top line of the note, fill in the Subject.
5. To prevent other users from viewing the note, select the Private check box.

   For information about how the Private check box controls access to the note, see Note Edit Page (on page 158).
6. Click Save.

To add a note in the Notes section

1. Select the record.

   For instructions on selecting records, see Finding Records (on page 74).
2. On the Detail page, scroll down to the Notes section and click New in the Notes title bar.
3. On the Note Edit page, fill in the Subject field and (optionally) the Description field.

   NOTE: Depending on your company setup, an HTML editor might be available for the Description field. For more information, see About the HTML Editor (on page 62).
4. To prevent others from viewing the note, select Private.

   For information about how the Private check box controls access to the note, see Note Edit Page (on page 158).
5. Save the record.

Note Edit Page

The Note Edit page lets you add a note to a record or update information in an existing note. It shows the complete set of fields for a note record. The following table describes the fields on the Note Edit page.

Field	Description
Subject	A required text field where you enter a brief description of the content or purpose of the note.
Private	If you are the creator of the note, then the Private check box works as follows:

Field	Description
	■ If you do not select the Private check box, or if you deselect the check box after it was previously selected, then anyone with access to the record can see the note on the record. ■ If you select the Private check box, then the note is not visible by default to other users, even if the note is linked to a record that is visible to others. However, the note might be visible to some users. Users who have the View Private Notes privilege enabled in their user role have visibility to all notes that have the Private check box selected, regardless of the owner of the note. The View Private Notes privilege does not allow a user to update or delete a note that has the Private check box selected and that is owned by another user. Typically, the View Private Notes privilege is given to company administrators only. If you select the Private check box on a note that you did not create, then only the creator of the note and users who have the View Private Notes privilege can see the note after you save your changes. You and other users will not be able to see the note. However, your name appears in the Owner field of the note.
Description	The content of the note. The maximum number of characters allowed is 16,350. **NOTE:** Different restrictions apply when you import notes into Oracle CRM On Demand (see Note Fields: Import Preparation (on page 1767)). Depending on your company setup, an HTML editor might be available for the Description field. For more information, see About the HTML Editor (on page 62).

Note Page (List)

The Note page shows all notes linked to a record. The following table describes what you can do from the Note page:

To do this	Follow these steps
Create a note	In the Notes title bar, click the New Note button. On the Note Edit page, complete the required information and save the record.
Delete a note	Click the Del link in the row of the record you want to delete. You can restore deleted items up to 30 days after deletion.
Find a note	Click a column header to sort the data for that column. If the Alpha Search controls are available, then you can click the header for the Subject column, and then click a letter in the Alpha bar to find notes where the subject begins with that letter. For notes beginning with numbers, click 0-9. **NOTE:** If your user language is Korean, Japanese, Simplified Chinese, or Traditional Chinese, then the Alpha Search controls are not available.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.

To do this	Follow these steps
Update a note	Click the Edit link in the row of the record you want to update. On the Note Edit page, update the information and save the record. If inline editing is enabled for your company, then you can also edit the fields that are displayed on the Note page inline.
Mark a note as private	Click the Edit link in the row of the record you want to update. On the Note Edit page, select the Private check box. If inline editing is enabled for your company, you can also select the Private check box inline on the Note page. **NOTE:** Some users have access to notes that are owned by other users and that have the Private check box selected. For more information about how the Private check box controls access to the note, see Note Edit Page (on page 158).
View note details	Click the Edit link in the row of the record you want to view. On the Note Edit page, review the note details.

Working with the List of Notes

If this feature is enabled for your company, the record Detail pages contain a note icon at the top right of the page. The number next to the note icon indicates the number of notes attached to the record.

When you click the note icon, a list of notes is displayed. For each note, the name of the user who created the note is displayed, together with the subject of the note or first part of the note text, if there is no subject. The date of the note is displayed, or if the note is from today, the time.

From the list of notes you can do the following:

To do this	Follow these steps
View a note	Scroll down to the required note.
Create a new note	Click New Note. Type a subject on the first line, type the note, and click Save. The note is sent to the Message Center of all users who have subscribed to the record. From the Message Center, users can click a link on the note to navigate to the record.
Subscribe to notes on the record	Click Subscribe. For more information, see Subscribing to Notes (on page 160).
Delete a note	Scroll down to the required note, and click Delete. This action deletes the note from the Message Center and the record Detail pages.
View details of the user who sent a note	Scroll down to the required note, and click the user name. The User Details page for the user is displayed.

Subscribing to Notes

You can subscribe to notes that are added to a record so that when someone adds a note to the record, the note is sent to your Message Center. You can subscribe to notes on any records to which you have access.

From the Message Center you can click on a link in a note on a record to navigate to the record.

For more information about the Message Center, see Working with the Message Center (on page 43).

To subscribe to notes on a record

1 Select the record.

  For more information on selecting records, see Finding Records (on page 74).

2 On the Detail page, click the note icon.

3 Click the Subscribe button.

  The button label changes to Unsubscribe. You can cancel the subscription by clicking the Unsubscribe button.

Sending Notes to Other Users

You can send a note to other users by clicking a note icon that is displayed next to a user's name in the application. The note is sent to the Message Center of the user.

You can use this facility with the fields associated with a user name, such as First Name, Owner, Created By, and Modified By. These fields appear in Detail pages, lists, and other places in the application.

From the Message Center you can reply to notes from other users.

You can add user records to the favorite Records section in the Action bar. This allows quick access to the users that you often send messages to.

For more information about using the Message Center, see Working with the Message Center (on page 43).

To send a note to another user

1 Move the pointer over the field associated with the user name so that the note icon appears.

2 Click the note icon

3 Type the note, and click Save.

Working with Attachments

Depending on how your company administrator configures your user role and access profiles, you might be able to attach files (and in some cases, URLs) to various record types. You can find instructions on attaching files in the following topics:

- For instructions on attaching files and URLs through the preconfigured Attachments related item, see Attaching Files and URLs to Records (on page 163).
- For instructions on attaching files to records that support attachment fields, see Attaching Files to Records through Attachment Fields (on page 167).

For a list of the record types that support the preconfigured Attachment related item, and a list of the record types that support attachment fields, see About Attachments (on page 162).

Related Topics

See the following topics for more information about attachments:

- About Attachments (on page 162)
- Attachment Related Items (on page 166)
- Attachment List Page (on page 166)

About Attachments

Depending on the record type and on how your company administrator has configured Oracle CRM On Demand, you can attach files to some records in the following ways:

- Through the Attachments related item on parent records
- Through attachment fields

About the Attachments Related Item

On certain record types, your company administrator can add the preconfigured Attachments related item to your record page layout. You can then link multiple attachments to a parent record. An attachment that is linked to a parent record in this way can contain a file or a URL.

The following record types support the preconfigured Attachments related item:

- Account
- Activity
- Campaign
- Contact
- Custom Objects 01, 02, and 03
- Dealer
- Event
- Fund
- Fund Request
- Household
- Lead
- Opportunity
- Partner
- Program Membership
- Service Request
- Solution

Attachments can also be linked to alert records and sales stage records.

For information about attaching files and URLs to records through the preconfigured Attachments related item, see the following topics:

- Attaching Files and URLs to Records (on page 163)
- Attachment Related Items (on page 166)
- Attachment List Page (on page 166)

About Attachment Fields

On the following record types, you can attach a single file to a record through attachment fields. Depending on how your company administrator has configured your page layouts, the attachment fields might be available on the following record types:

- Custom Objects 01, 02, 03, 04, and higher

  NOTE: Your company administrator can also configure Custom Object record types as related items on other record types. If the attachment fields are available on the related Custom Object record type, you can attach one file to each related record. Such configurations allow you to link multiple files to a parent record. For more information, see About Attachment Configurations (on page 1356).

- Inventory Audit Report
- Sample Transaction

- Signature

The following record types also support attachment fields. However, these record types can be used only as related items, as follows:

- Accreditation Attachment

  The Accreditation Attachment record type can be made available as a related item on the Accreditation record type only.
- Application Attachment

  The Application Attachment record type can be made available as a related item on the Application record type only.
- Business Plan Attachment

  The Business Plan Attachment record type can be made available as a related item on the Business Plan record type only.
- Certification Attachment

  The Certification Attachment record type can be made available as a related item on the Certification record type only.
- Course Attachment

  The Course Attachment record type can be made available as a related item on the Course record type only.
- Exam Attachment

  The Exam Attachment record type can be made available as a related item on the Exam record type only.
- MDF Request Attachment

  The MDF Request Attachment record type can be made available as a related item on the MDF Request record type only.
- Objective Attachment

  The Objective Attachment record type can be made available as a related item on the Objective record type only.
- Partner Program Attachment

  The Partner Program Attachment record type can be made available as a related item on the Partner Program record type only.
- Policy Attachment

  The Policy Attachment record type can be made available as a related item on the Policy record type only.
- Special Pricing Request Attachment

  The Special Pricing Request Attachment record type can be made available as a related item on the Special Pricing Request record type only.

Some of these record types are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition and might not be available in your edition of Oracle CRM On Demand.

For information about attaching files to records through attachment fields, see Attaching Files to Records through Attachment Fields (on page 167).

Attaching Files and URLs to Records

NOTE: This topic applies only to attachments that are linked to records through the preconfigured Attachments related item. For a list of the record types that support the preconfigured Attachments related item, see About Attachments (on page 162).

On record types that support the preconfigured Attachments related item, you can attach files and URLs to a parent record. After a file or URL is attached to a record, you can:

- View the attachment
- Select a different attachment
- For a file attachment, update the file content and replace the previous attachment with the revised one

When attaching files to records, the following considerations apply:

- You can upload compressed files, including .zip files.
- For data protection and security reasons, each file that you attempt to upload is checked to determine whether it is an executable file, regardless of the file extension. If a file is identified as an executable file, then you cannot upload it.
- A file name can contain any character that is supported for use in file names in Microsoft Windows.
- In the case of files that are uploaded as attachments to records through the preconfigured Attachments related information section, you cannot upload two files with the same file name as attachments to the same parent record. However, all photographs that are uploaded from mobile devices that use the iOS operating system are given the same name by the mobile device. To ensure uniqueness of file names within the set of attachments linked to a parent record, Oracle CRM On Demand appends the current timestamp to the file name of all such files. This means that if you upload the same file as an attachment more than once from a mobile device that uses the iOS operating system, then the file is added as an attachment each time that you upload it, but the file names of the attachments in Oracle CRM On Demand are different.
- Each file that you attempt to upload is scanned for viruses. If a virus is found in the file, the file is not uploaded, and a message appears.
- Uploaded files must be less than 20 MB. If you have a large file, consider the following options:
  - Compress the file to make it smaller.
  - Split the file into smaller files (and compress them if necessary).
  - Place the file on a public server and indicate the path and file name for it instead of attaching the file to the record.

To attach a file or URL to a record

1. Select the record that you want to attach the file or URL to.

   For instructions on selecting records, see Finding Records (on page 74).
2. On the Detail page, scroll down to the Attachments section and click Add Attachments or Add URL in the title bar.

   NOTE: If you want to send users to a public server to access the file, then click Add URL instead of Add Attachment and follow the procedure for adding a URL attachment, and not a file attachment.
3. On the Attachment Edit page, do the following:
   - For a file attachment, click the Browse button next to the File field and select the file. After you select the file, the Attachment Name field shows the name of the file without the file extension by default. If you want to use a different name as the display name that identifies the file attachment, then change the value in the Attachment Name field.

     NOTE: If you are using a device with a version of the iOS operating system that is supported for use with Oracle CRM On Demand, then the option to take a photograph or video is also available. After you take the photograph or video, it is automatically uploaded to Oracle CRM On Demand as an attachment.
   - For a URL attachment, fill in the URL field with the URL address (for example: www.crmondemand.com) and the Attachment Name field with a display name that identifies the URL. The maximum allowed length of the URL address is 1999 characters.

     If the text string that you enter in the URL field starts with http:// or https://, then the text might be automatically converted to a link after the field value is saved. The Convert URL Text Values to Links check box on the company profile determines the behavior of such text in the URL field, as follows:

- If the check box on the company profile is selected, then the text is automatically converted to a link after the field value is saved.
- If the check box is not selected, then the text is not converted to a link.

NOTE: If you have placed a file attachment on a public server, then fill in the URL field with the path and filename using the file: directive as file://///*<computer_name>*/*<directory>*/*<file_name>*, with 5 slashes after file:, for example, file://///scdept/attachments/products.xls. For information on your browser's support for the local file system and the share path URL using the file: protocol, refer to your browser's product documentation.

4 On the Attachment Edit page:
   - If you want to add another attachment of the same type (file or URL), then click Save & New.
   - If you are finished adding attachments of this type, then click Save.

To view an attachment

1 Select the record that the file or URL is attached to.
   For instructions on selecting records, see Finding Records (on page 74).
2 On the Detail page, scroll down to the Attachments section and click View in the appropriate row.

To select a different attachment

1 Select the record that the file or URL is attached to.
   For instructions on selecting records, see Finding Records (on page 74).
2 On the Detail page, scroll down to the Attachments section and click the Attachment Name link for the attachment you want to replace.
3 On the Attachment Edit page, do the following:
   - For a file attachment, click the Browse button and select the new file. After you select the new file, the Attachment Name field is automatically updated to show the name of the new file without the file extension. Update the Attachment Name field, if necessary.
   - For a URL attachment, fill in the URL field with the new URL address and update the Attachment Name field, if necessary.
4 On the Attachment Edit page, click Save.

TIP: To verify that you have entered the correct attachment information, click the Back link until you return to the original record Detail page. In the Attachments section, review the new attachment record.

To update a file attachment

1 Open the attachment from its original location, but not from within Oracle CRM On Demand.
2 Edit the file and save it locally, such as to your hard drive.
3 Sign in to Oracle CRM On Demand.
4 Select the record that you want to attach the updated file to.
   For instructions on selecting records, see Finding Records (on page 74).
5 On the Detail page, scroll down to the Attachments section and click Replace in the row of the file attachment.
6 In the Replace Attachment window, select the updated file and click Save.

Attachment Related Items

NOTE: This topic applies only to attachments that are linked to records through the preconfigured Attachments related item. For a list of the record types that support the preconfigured Attachments related item, see About Attachments (on page 162).

The following table describes field information for a file or URL that you attach as a related item on a record. Some fields appear on the Detail pages for the record type you are attaching the file to; other fields appear on the Attachment Edit page.

Review the information in the following table to make sure your file meets the file size and file type requirements.

Field	Description
File	For a file attachment, this field shows the path and filename of the attached file.
Attachment Name	The name you want to use to identify the file or URL. When you upload a file as an attachment, the Attachment Name field shows the name of the file without the file extension by default, but you can change the name.
Size (in Bytes)	For a file attachment, the file size. The file size must be less than 20 megabytes (MB). If the attachment is a URL, the Size field shows a value of 2 kilobytes (KB) by default.
Type	For a file attachment, this field shows the file type, such as .doc for a Microsoft Word document. For data protection and security reasons, each file that you attempt to upload is checked to determine whether it is an executable file, regardless of the file extension. If a file is identified as an executable file, then you cannot upload it. For a URL attachment, it displays URL.
URL	For a URL attachment, this field contains the complete URL address. The maximum allowed length of the URL address is 1999 characters.
Created By	The alias of the person who first attaches the file to the record. The value in this field is system-generated.
Modified By	The name of the person who updates the record followed by the date and time it is updated. The value in this field is system-generated.

Attachment List Page

NOTE: This topic applies only to attachments that are linked to records through the preconfigured Attachments related item. For a list of the record types that support the preconfigured Attachments related item, see About Attachments (on page 162).

The Attachment List page shows all files and URLs linked to a record. You access the Attachment List page by clicking the Show Full List link in the Attachments section of the main record.

The following table describes the tasks you can perform from the Attachment List page.

To do this	Follow these steps
Attach a file to the record	In the Attachments title bar, click the Add Attachment button. On the Attachment Edit page, complete the required information and save the record.
Attach a URL to the record	In the Attachments title bar, click the Add URL button. On the Attachment Edit page, complete the required information and save the record.
Delete an attachment	Click the Del link in the row of the record you want to delete. You can restore deleted items up to 30 days after deletion.
Find an attachment	Click the Attachment Name column header to sort the data. Then click a letter in the alphabet bar. For attachment names beginning with numbers, click 0-9.
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Select a different attachment to replace the current one	Click the Replace link in the row of the record you want to change. On the Attachment Edit page, select another file and save the record.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Sort the list of attachments	Click the underlined column header you want to sort on. If the column header is not underlined, you cannot sort on that field.
View the attachment	Click the View link in the row of the record you want to view. This opens the file or takes you to the URL.

Attaching Files to Records through Attachment Fields

Attachment fields are supported on Custom Object record types and on certain record types that are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition. The attachment fields allow you to attach a single file to a record. For a list of the record types where attachment fields are supported, see About Attachments (on page 162).

Your company administrator determines if the attachment fields are available on the page layouts for your user role.

When attaching files to records, the following considerations apply:

- You can upload compressed files, including .zip files.
- For data protection and security reasons, each file that you attempt to upload is checked to determine whether it is an executable file, regardless of the file extension. If a file is identified as an executable file, then you cannot upload it.
- A file name can contain any character that is supported for use in file names in Microsoft Windows.
- In the case of files that are uploaded as attachments to records through the preconfigured Attachments related information section, you cannot upload two files with the same file name as attachments to the same

parent record. However, all photographs that are uploaded from mobile devices that use the iOS operating system are given the same name by the mobile device. To ensure uniqueness of file names within the set of attachments linked to a parent record, Oracle CRM On Demand appends the current timestamp to the file name of all such files. This means that if you upload the same file as an attachment more than once from a mobile device that uses the iOS operating system, then the file is added as an attachment each time that you upload it, but the file names of the attachments in Oracle CRM On Demand are different.

- Each file that you attempt to upload is scanned for viruses. If a virus is found in the file, the file is not uploaded, and a message appears.
- Uploaded files must be less than 20 MB. If you have a large file, consider the following options:
  - Compress the file to make it smaller.
  - Split the file into smaller files (and compress them if necessary).
  - Place the file on a public server and indicate the path and file name for it instead of attaching the file to the record.

The following procedure describes how to attach a file to a record through attachment fields.

To attach a file to a record through attachment fields

1. On the Edit page of the record to which you want to attach the file, in the Attachment field, click the paper clip icon:

2. Browse to the file you want to attach and select it.

   NOTE: If you are using a device with a version of the iOS operating system that is supported for use with Oracle CRM On Demand, then the option to take a photograph or video is also available. After you take the photograph or video, it is automatically uploaded to Oracle CRM On Demand as an attachment.

3. Save your changes.

NOTE: Depending on how your company administrator configures the page layout, you might see the Attachment: File Name field and the Attachment: Size (In Bytes) field on the page. If these fields are present, they are automatically populated with the file name and file size when you save the record. You cannot edit these fields.

You can remove an attached file from a record. However, when you remove the file, it is deleted from the Oracle CRM On Demand database, and you cannot restore it from within Oracle CRM On Demand.

TIP: Before you remove the file from the record, download the file to your local machine or another server and save it.

The following describes how to remove a file from a record.

To remove a file from a record

1. On the record Edit page, click the X icon next to the Attachment field.
2. Confirm that you want to remove the file from the record.

Using Assessment Scripts

If your company administrator sets up assessment scripts, you can access the scripts to collect information about your customer or sales opportunity. The information can then be mapped to the parent record and used in reports and analyses later.

The application allows you to access scripts from these record types:

- Account (Account Surveys)
- Activity (Activity Assessments on a Sales Call, Task, or Appointment)

- Business Plan (Business Plan Assessments)
- Contact (Customer Satisfaction Surveys)
- Lead (Lead Qualification Scripts)
- Objective (Objective Assessments)
- Opportunity (Opportunity Assessments)
- Service Request (Call Scripts and Customer Satisfaction Surveys)

Your company administrator can set up filters to help you to identify the appropriate assessment for a task. For example, a lead qualification assessment script might be set up with the following filters:

- Account Tier = Gold
- Segment = Large
- Region = West

Then, when you launch an assessment script from a lead record with the corresponding filter field values, the correct lead qualification script is listed. After an assessment is completed, data that the company administrator changes subsequently in the template script is not reflected in the completed assessment record. The answer section is the only exception to this rule. The company administrator can change data in the answer section at any time, and changes are reflected in the assessment detail page when you work through the template questions.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see About Assessment Scripts (on page 1865).

To use an assessment script

1. Select the record.

   For instructions on selecting records, see Finding Records (on page 74).
2. On the record Detail page, scroll down to the script section and click Add.
3. If necessary, select the script from the Lookup window.

   If only one script meets the criteria defined by your company administrator, the script opens automatically. Otherwise, you need to select the appropriate script in the Lookup window.

   TIP: To find the appropriate script, select an option from the drop-down list, and click Go.
4. On the script page, ask your customer the questions and fill in the information.
5. Click Save.

   Depending on how your company administrator set up this script, these events might occur:

   - A score is calculated and compared to a threshold.
   - Depending on whether the score is above or below the threshold, an outcome is calculated.
   - The score, answers to the questions, and the outcome are mapped back to the parent record.
   - The last assessment date is also populated.

About Deleting and Restoring Records

When you delete a record or a list of records, the records are stored for 30 days in the Deleted Items area. During that time, you can restore the records. However, after 30 days, the deleted items are permanently purged and cannot be retrieved.

NOTE: For a list of the record types that are stored in the Deleted Items area, see Oracle Web Services On Demand Guide, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network.

Types of Delete Operations

When you delete a record, the delete operations that are performed on the record and its related records are determined by the record types and the relationships between the records. The types of delete operations are as follows:

- **Direct delete.** When you delete a record, the record itself is deleted. This operation is called a *direct delete.*
- **Cascade delete.** When you delete a record, any of the record's child records that are not of a top-level record type, such as notes and attachments, are also deleted. This operation is called a *cascade delete.*

  The following exceptions apply:

  - A cascade delete is not performed on audit trail records when their parent record is deleted.
  - A cascade delete is not performed on a child address record if it is a shared address.
- **Deep delete.** In some cases, when you delete a record, some of the record's child records that are of a top-level record type are also deleted. This operation is called a *deep delete.*

  When a deep delete is performed on a child record, the following happens:

  - A cascade delete is performed on any of the record's child records that are not of a top-level record type, with the exception of audit trail records and any child address records that are shared addresses.
  - A deep delete is performed on some of the record's child records that are of a top-level record type, depending on the record types involved.

  The following table shows the record types on which a deep delete is performed when a parent record is deleted. Apart from the record types listed in this table, all other child records that are of a top-level record type are untouched when their parent record is deleted.

Parent Record Type	Record Types on Which a Deep Delete Is Performed
Account	- Asset - Lead - Opportunity - Vehicle
Contact	Lead
Dealer	Vehicle
Opportunity	Lead
Partner	- Lead - Opportunity

For example, assume that you have an account that has child note records, a child custom object 04 record, and a child opportunity record. The child opportunity record has child note records, a child custom object 05 record, and a child lead record. If you delete the account record, then the following happens:

- A direct delete is performed on the account record.
- A cascade delete is performed on the account's child note records.
- The account's child custom object 04 record is untouched because the Custom Object 04 record type is a top-level record type and is not listed in the table of record types on which a deep delete is performed.
- A deep delete is performed on the account's child opportunity record.

When a deep delete is performed on the account's child opportunity, the opportunity's child records are treated as follows:

- A cascade delete is performed on the opportunity's child note records.
- The opportunity's child custom object 05 record is untouched because the Custom Object 05 record type is a top-level record type and is not listed in the table of record types on which a deep delete is performed.

- A deep delete is performed on the opportunity's child lead record.

About Deleting Record Associations

When you delete a child record that is linked to another (parent) record, Oracle CRM On Demand does not delete the information that associates the records with each other. The association information is retained so that if a deleted record is later restored, the associations between the restored record and any records with which it was previously linked can also be restored. However, because the association information for the deleted child record is retained in the parent record, Web service calls that query the parent record will return the association information.

Therefore, if you want to delete a record, and if you also want to delete the information that associates that record with another record, then it is recommended that you first delete the association between the records by unlinking the records. For example, if you have an account record that is linked to a custom object 01 record, and if you want to delete the account and the association between the account and the custom object 01 record, then unlink the account record from the custom object 01 record before you delete the account. However, if you later restore the account record, then the relationship between the account record and the custom object 01 record is not restored.

Additional Information About Deleting Records

The following table provides additional information about deleting records.

If you delete this	You should be aware of this
Account	You cannot delete an account if it is linked to an Opportunity with a Sales Stage of Closed-Won.
Activity	Users who have the Delete Any Activity privilege in their role can delete activities that they do not own or activities that are marked private. Typically, the Delete Any Activity privilege is given to company administrators only.
Address	If you restore a deleted address, you must update the Billing and Shipping settings because when Oracle CRM On Demand restores the address record, it does not restore the address settings to the original values. You must readjust these values to avoid the creation of erroneous data. For more information about deleting shared addresses, see Deleting Shared Addresses (on page 349).
Division	For information about what happens when divisions are deleted, see About Merging Divisions and Deleting Divisions (on page 1172).
Group	When you delete a group, the system removes the reference to the group from the group’s records, and the record ownership reverts to the employee in the Owner field. If that process involves a large number of records, it might take some time to complete. During that time, the system does not allow group members to create records.
Opportunity	You cannot delete an opportunity where the Sales Stage field is set to Closed because that information is used for historical reporting.

If you delete this	You should be aware of this
Product	You cannot delete a product. To remove a product from the list of available products that can be linked to opportunities or linked to accounts as assets, company administrators can deselect the Orderable check box on the Product Edit page.
Product Category	A user whose role includes the Manage Content privilege can delete product categories. When a category is deleted, the association between the product and the category is broken, but the products are retained.
Role	A user whose role includes the Manage Roles and Access privilege can delete roles. Instead of being stored for 30 days, deleted roles are immediately purged from the system and cannot be restored. Before deleting a role, all users assigned to that role must be assigned to a different role. Otherwise, the application does not let you delete the role.
Solution	When you delete a solution, the solution history records are also deleted. If you believe a solution is no longer useful, but it was at one time linked to a service request, then change the status of the solution to Obsolete instead of deleting the solution. That way, your company can prevent the solution from further use by your customer service representatives, but it is saved for historical purposes. To determine if the solution has been used, go to the Solution Detail page, and check the Service Requests section for linked records.
Territory	A user whose role includes the Manage Territories privilege can delete territories. Territories can be deleted whether or not they are associated with other territories, accounts, opportunities, and so on. The Territory Detail page shows the company administrator if the territory has any children or not. The company administrator can search for accounts, opportunities, and so on, using the Territory field in the search criteria to find out if the territory that is to be deleted is associated with any records.

NOTE: For further information on linked records, see Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 252).

Deleted Items

When you click the Deleted Items global link, the All Deleted Items page appears with all the items you have deleted. If your user role includes the Recover All Records privilege, you will see all deleted items for your company.

The parent record appears in the deleted items list, but the linked records do not. The only time a linked record appears as a separate record is when you delete the linked record *before* deleting the parent record.

For example, if you delete an account with three notes linked to it, then the note records do not appear in the list of deleted items. However, if you had deleted one of those linked notes before deleting the account itself, then that note appears in the list of deleted items as a separate record.

When you restore a record, all records linked to that record at the time it was deleted are also restored with their relationships intact. Always restore the parent record first; if you try to restore a child record first, the system displays an error message.

You can use the list on the All Deleted Items page to help you to find deleted records. When you select a record type from the list, the records that are displayed include all deleted notes and attachments for records of that type, as well as all deleted records of that type. However, the rule for linked records still applies. Notes and attachments that were deleted with the parent record are not shown in the list. For example, if you select All Accounts in the list, all account notes and account attachments that were deleted separately from their parent record are displayed, as well as all deleted account records.

NOTE: Companies are limited to the amount of data they can store. Records stored in Deleted Items do not count towards a company's total disk storage limit.

About Row IDs for Deleted Items

When you delete a record, the deleted item is given a row ID that is different from the row ID of the original record. However, when you restore the record, the original row ID of the record is restored. If you select the option to export all fields when you export a list of deleted items, then the data that is exported for each deleted item includes both the row ID that was assigned to the deleted item, and the original row ID of the record. For more information about exporting lists of records, see Exporting Records in Lists (on page 143).

Related Topic

See the following topic for instructions on deleting and restoring records:

- Deleting and Restoring Records (on page 173)

Deleting and Restoring Records

You can delete a record if your access level to that record allows it. Depending on the privileges that are enabled for your user role, you might also be able to perform some or all of the following tasks:

- Delete a list of records.
- Restore individual records that other users deleted.
- Restore a list of records that you deleted.
- Restore a list of records that another user deleted.

CAUTION: When you delete a record, some or all of the records linked to the record that you delete might also be deleted.

Before you begin. It is recommended that you read the About Deleting and Restoring Records (on page 169) topic, which provides information about the linked records that are deleted when a parent record is deleted as well as other information about deleting and restoring records.

Deleting Individual Records

The following procedure describes how to delete a record from a record Detail page.

To delete a record from a record Detail page

- On the record Detail page, click Delete.

  NOTE: If you access the record Detail page by drilling down from a List page or from a list of related records on a parent record, then after you delete the record, Oracle CRM On Demand returns to the page from which you drilled down.

The following procedure describes how to delete a record in a list of records.

To delete a record in a list of records

- In the row for the record that you want to delete, choose Delete from the record-level menu.

Deleting Lists of Records

Many top-level record types support the batch delete feature, which enables you to delete multiple records at the same time from a List page. The following procedure describes how to delete a list of records.

NOTE: Certain record types that are specific to Oracle CRM On Demand Life Sciences Edition do not support the batch delete feature, including the Message Response, Messaging Plan, Messaging Plan Item, Messaging Plan Item Relations, Inventory Audit Report, Inventory Period, Sample Disclaimer, Sample Transaction, and Transaction Item record types.

Before you begin. To perform this procedure, your user role must include the Batch Delete and Restore privilege.

To delete a list of records

1. Open the list of records that you want to delete.

   TIP: Export the list before you delete it. Exporting the list allows you to import the data in to Oracle CRM On Demand if you delete some records in error.

2. On the record List page, click the Menu button and select Batch Delete.
3. Click OK to confirm that you want to proceed.

   The Batch Delete and Restore Queue page opens. Your request appears in the Active Requests section of the page. When the request is successfully prepared, Oracle CRM On Demand sends you an email, and the Proceed option becomes available in the record-level menu for the request on the Batch Delete and Restore Queue page. In the meantime, you can optionally navigate away from the Batch Delete and Restore Queue page and then return to it later to finish deleting the list of records. You can return to the Batch Delete and Restore Queue page at any time by clicking the Admin global link and then clicking the Batch Delete and Restore Queue link on the Admin Homepage.

4. In the Active Requests section of the Batch Delete and Restore Queue page, in the record-level menu for the request that you submitted, click Proceed.

   NOTE: If you do not click Proceed, then the records are not deleted.

5. Click OK to confirm that you want to proceed.

   When the operation completes, Oracle CRM On Demand sends you an email.

6. To review the log file for the operation, in the entry for the request in the Processed Requests section of the Batch Delete and Restore Queue page, click View Delete Log.

Restoring Individual Records

You can restore any record that you deleted. If your role includes the Recover All Records privilege, then you can also see the records that other users deleted in the Deleted Items area, and you can restore them. The following procedure describes how to restore an individual record.

Before you begin. To perform this procedure, the Deleted Items global link must be enabled for your theme.

To restore an individual record

1. Click the Deleted Items global link.
2. Click Restore in the row for the record.

   NOTE: When you delete a record, the record is stored for 30 days in the Deleted Items area. During that time, you can restore the record. However, after 30 days, the deleted record is permanently purged and you cannot retrieve the record. For more information about the Deleted Items area, see About Deleting and Restoring Records (on page 169).

Restoring Deleted Lists of Records

If you deleted a list of records through the Batch Delete option on a List page, then you can restore all of the records in that list at the same time. Similarly, if you deleted a list of records through Web services and set the AvailableForBatchRestore element in the request to true, then you can restore the list of records. If a Web services request deletes child records as well as parent records, then there are separate request records for each record type, and you must restore the lists of child records and the list of parent records separately.

If your user role includes the Recover All Records privilege, then you can also restore the lists of records that other users deleted.

The Channel field in a delete request record indicates whether the delete operation was performed interactively (that is, through a browser window) or through Web services.

The following procedure describes how to restore a deleted list of records.

Before you begin. To perform this procedure, your user role must include the Batch Delete and Restore privilege.

To restore a deleted list of records

1. Navigate to the Batch Delete and Restore Queue page in one of the following ways:
   - Click the Admin global link, then click Batch Delete and Restore Queue.
   - On any record List page, click the Menu button and select Batch Restore.
   - Click the Deleted Items global link, then click the Menu button on the Deleted Items page, and then select Batch Restore.
2. On the Batch Delete and Restore Queue page, in the Processed Requests section, find the batch delete request for the list that you want to restore.

   NOTE: When you delete a list of records, the records are stored for 30 days in the Deleted Items area. During that time, you can restore the records. However, after 30 days, the deleted records are permanently purged and you cannot retrieve the records. For more information about the Deleted Items area, see About Deleting and Restoring Records (on page 169).

   TIP: If a processed request is not shown in the Batch Delete and Restore Queue page, then you can expand the list of requests by clicking Show Full List.
3. In the record-level menu for the request, select Restore.

   The batch delete request is moved from the list of processed requests to the Active Requests section of the Batch Delete and Restore Queue page. When the request is successfully prepared, Oracle CRM On Demand sends you an email, and the Proceed option becomes available in the record-level menu for the request on the Batch Delete and Restore Queue page. In the meantime, you can optionally navigate away from the Batch Delete and Restore Queue page and then return to it later to finish restoring the list of records. You can return to the Batch Delete and Restore Queue page at any time by clicking the Admin global link and then clicking the Batch Delete and Restore Queue link on the Admin Homepage.
4. In the Active Requests section of the Batch Delete and Restore Queue page, in the record-level menu for the request that you submitted, click Proceed.

   NOTE: If you do not click Proceed, then the records are not restored.
5. Click OK to confirm that you want to proceed.

   When the operation completes, Oracle CRM On Demand sends you an email.
6. To review the log file for the operation, in the entry for the request in the Processed Requests section of the Batch Delete and Restore Queue page, click View Restore Log.

Viewing Audit Trails for Records

On record types that support audit trails, you can view the audit trail that tracks the changes made to the audited fields on a record.

Depending on how your company administrator configures the audit trail for the record type, the audit trail can also show the following:

- An entry for the creation of the record
- If the record has been deleted or restored, an entry for each of these actions

  NOTE: If a record has been deleted but has not been restored, the record itself is no longer accessible, so you cannot view the details of the delete action in the related audit trail information. However, there is an entry for the delete action in the company-wide Master Audit Trail. If the record is later restored, there is an entry for the delete action and an entry for the restore action in the company-wide Master Audit Trail and in the audit trail information on the record. To view the company-wide Master Audit Trail, you must have the Access Master Audit Trail and Admin Configuration Audit privilege in your user role.

For changes to records, the audit trail shows the old and new values in a field, as well as the timestamp and the name of the user who made the change to the field. Your company administrator determines which fields, if any, are audited. For information about the record types that support audit trails, and a list of the fields that are audited by default, see Customizing the Audit Trail (on page 1306).

Before you begin. To enable you to view the audit trail for a record type, your company administrator must make sure that the page layouts for your role are configured to include the Audit Trail related item on the Detail page layout for the parent record type. Your company administrator must also give you read-only access to the Audit Trail related item on the parent record type. If the Audit Trail related item is still not visible on your record Detail page after the company administrator has completed the configuration, click the Edit Layout link on the record Detail page, and add the Audit Trail as a related information section. For more information on editing your Detail page layouts, see Changing Your Detail Page Layout (on page 749).

NOTE: The Invitee, Account Event, Lead Event, and Opportunity Event record types are child record types of the Event record type. To enable you to view the audit trail for records of these record types, your administrator must add the Audit Trail related information section to the Detail page layout for the Invitee, Account Event, Lead Event, and Opportunity Event record types, through the Application Customization pages for the Event record type. To allow you to view the audit trail for invitee records, your administrator must give you read-only access to the Invitee Audit Trail related item for the Event parent record type. To allow you to view the audit trail for account event, lead event, and opportunity event records, your administrator must give you read-only access to the Audit Trail related item for the Account Event, Lead Event, and Opportunity Event record types.

To view the audit trail for a record

- On the record Detail page, scroll down to the Audit Trail related information section.

  Each row shows the date on which the record was updated and who made the update. The new and old values in the changed audited field are also shown.

  NOTE: Each audit trail record of a change shows the details of one change to only one field. The audit trail records of changes are shown only for the audited fields. So, if a user saves a record after changing two fields, but only one of those fields is audited, then an audit trail record is shown for the change to the audited field only. The details of the change to the other field are not shown.

About Duplicates When Creating Records

For many record types, when you create a record, Oracle CRM On Demand warns you if that record already exists. The existing record can reside in your current company records. If you receive the duplicate error message, cancel creating the record, find the existing record, and update it.

For the following record types, Oracle CRM On Demand does not check for duplicate records when you create a new record through the user interface:

- Activity
- Account Revenue

- Assessment
- Contact
- Contact Revenue
- Custom Object 01, 02, 03, 04 and higher
- Deal Registration Product Revenue
- Household
- Lead
- Note
- Opportunity Product Revenue
- Order
- Order Item
- Sample Disclaimer

  NOTE: Only one sample disclaimer where the disclaimer type is set to Global can be active at any time, and only one sample disclaimer where the disclaimer type is set to Multilingual can be active for any country at any time.

- Sample Request
- Sample Request Item
- Special Pricing Product
- Special Pricing Request

NOTE: Before adding a new record, search the records list to make sure that the record does not already exist.

The following table lists the fields that are used to determine if a record is a duplicate when the record is created through the user interface.

NOTE: For information on what constitutes record duplication when records are imported, see About Record Duplicates and External IDs (on page 1635).

Records of This Type	Are Duplicates If All of These Fields Match
Account	Account Name and Location
Account Competitor	Competitor Name
Account Partner	Partner Name
Address	Address Name
Appointment Contact	Contact Name
Appointment User	User Name
Attachments	File Name
Business Plan	Plan Name, Type, Status, and Period
Campaign	Source Code
Campaign Recipient	Contact

Records of This Type	Are Duplicates If All of These Fields Match
Division	Division Name
Event	End Date and Name
Objective	Objective Name, Type, Status, and Period
Opportunity	Opportunity Name, Account, and Primary Contact ID **NOTE:** The Primary Contact ID is the ID of the contact that you select in the Primary Contact Last Name field.
Opportunity Competitor	Competitor Name
Opportunity Partner	Partner Name
Plan Account	Account and Business Plan Name
Plan Contact	Contact and Business Plan Name
Plan Opportunity	Business Plan and Opportunity
Product	Product Name
Product Category	Category Name
Service Request	Service Number **NOTE:** The Service Number is automatically generated by Oracle CRM On Demand.
Social Media	Unique ID **NOTE**: Oracle CRM On Demand automatically sets the Unique ID field to the Row ID of the record.
Social Profile	Author, Community, and Contact
Solution	Title
Task Contact	Contact Name
Task User	User Name
Team	User Name
User	User ID and Company Sign In ID
Partner Relationship Management	

Records of This Type	Are Duplicates If All of These Fields Match
Accreditation	Accreditation Name
Accreditation Request	Accreditation Name, Partner Name, and Request Date
Application	Application ID **NOTE:** The Application ID is automatically generated by Oracle CRM On Demand.
Certification	Certification Name
Certification Request	Certification Name, Contact Name, and Request Date
Course	Course Name
Course Enrollment	Course Name, Candidate Name, and Enrollment Date
Deal Registration	Name and Principal Partner
Exam	Exam Name
Exam Registration	Exam Name, Candidate Name, Owner, and Exam Date
Fund	Fund ID **NOTE**: Oracle CRM On Demand automatically sets the Fund ID field to the Row ID of the record.
Fund Request	Request Name and Request Date
MDF Request	Request Name and Request Date
Partner	Partner Name and Location
Partner Program	Partner Program Name
Price List	Price List Name and Type
Price List Line Item	Price List, Product, and Type
Life Sciences	
Allocation	Allocation Type, Sample, and Owner
Blocked Product	Product, Contact
Contact Best Time	Day, Start Time, End Time, Address, and Contact Full Name

Records of This Type	Are Duplicates If All of These Fields Match
Contact State License	License Number and Contact Full Name
HCP Contact Allocation	Contact Name, Product Name, Allocation Type, and Start Date
Inventory Audit Report	Type, Status, Reason, Completed Date, Inventory Period, and Owner User Sign In ID
Inventory Period	Start Date, Active, Reconciled, and Owner
Message Response	Response, End Time, Start Time, Sequence Number, Followup, and Solution ID
Messaging Plan	Name, Disclosure Mandatory, Lock Sequence, Enable Followup, Status, Type, Product Name, and Owner
Messaging Plan Item	Disclosure Message, Sequence Number, Type, Parent Messaging Plan, and Solution Name
Messaging Plan Item Relations	Type, Parent MP Item, and Solution Name
Product Detailed	Product name and Indication picklist, or Product name with Product-Indication selection
Product Indication	Indication Name and Product Name
Promotional Item Dropped	Product
Related Disclaimer	Language and Sample Disclaimer Row ID **NOTE:** The Sample Disclaimer Row ID is taken from the parent sample disclaimer.
Sample Dropped	Product, with either no sample lots or with the same sample lot **NOTE:** Products with different sample lot numbers are considered unique.
Sample Inventory	Inventory Period and Sample
Sample Lot	Lot # and Sample
Sample Transaction	Name, Date, and Type
Signature	Signature Control and Activity
Transaction Item	Line Number, Transaction #, and Sample
Wealth Management	

Records of This Type	Are Duplicates If All of These Fields Match
Financial Account	Financial Account
Financial Account Holder	Business Account, Financial Account Holder Name, Financial Account, and Role
Financial Account Holding	Financial Account, Financial Product, and Financial Account Holdings Name
Financial Plan	Financial Account, Financial Plan Name, and Type
Financial Product	Financial Product Name
Financial Transaction	Financial Account, Financial Product, and Transaction ID
Portfolio	Account Number and Product
Insurance	
Broker Profile	Partner, Broker Profile Year, and Broker Profile Name.
Claim	Claim Number and Policy
Coverage	Coverage Name, Coverage, and Policy
Damage	Claim Number, Insurance Property, and Damage Name
Insurance Property	Type, Policy, and Sequence Number
Involved Party	Claim Number, Contact, and Role
Policy	Policy Number
Policy Holder	Policy, Role
Automotive	
Dealer	Name
Financial Information	Finance Detail # **NOTE:** The Finance Detail # is automatically generated by Oracle CRM On Demand.
Make	Make

Records of This Type	Are Duplicates If All of These Fields Match
Sales History	Sales Number **NOTE:** The Sales History # is automatically generated by Oracle CRM On Demand.
Sales Hours	Day and Open Time
Service History	SH # **NOTE:** The Service History # is automatically generated by Oracle CRM On Demand.
Service Hours	Day and Open Time
Territory	Name
Vehicle	VIN
Vehicle Contact	User Name

Printing Information That Appears on Pages

From all pages except the Edit pages, you can print the information that shows on that page. All extraneous interface elements and links are excluded when you print a page. When printing the information that appears on a page, note the following points:

- If the related information sections on a record Detail page are shown as tabs, then only the related information section that is currently open is shown on the printed Detail page. The open related information section appears on the printed page in list mode, without the tab image.
- When you print a record List page, only the records that are displayed on the page are shown on the printed List page, even if there are more records in the list. The maximum number of records that you can display in a List page is 100. For more information about displaying records in list pages, see Working with Lists (on page 125).

To print the information appearing on your page

1. Click the Printer Friendly link.

   A separate page opens, showing the printer-friendly page.
2. In the page, click the Print link.
3. In the Print window, adjust the preferences for your printer to ensure that it prints the page in landscape mode.

   Using Landscape mode optimizes the appearance of the data on the printed page.
4. Follow the onscreen instructions to print the page.

Viewing Oracle CRM On Demand Service Information

The Service Information page provides information about planned and recent maintenance sessions for your Oracle CRM On Demand production environment and staging environment. The *production environment* is the environment where your company performs its work in Oracle CRM On Demand. The *staging environment* is typically a copy of the production environment that can be used for testing purposes, for example, to test configuration changes before applying them to the production environment, or to test patches before they are applied to the production environment.

The Service Information page also provides information about the availability of your Oracle CRM On Demand production environment over the last number of months.

The following procedure describes how to view Oracle CRM On Demand service information.

To view Oracle CRM On Demand service information

- Scroll to the bottom of any page in Oracle CRM On Demand, and click Service Information to open the Service Information page.

In the Service Information page, the Version Information section shows details of the version level, patches, and so on, which apply to the Oracle CRM On Demand environment where you are currently signed in. This information is used by Oracle for troubleshooting purposes. You might be asked to provide this information if you contact Oracle for assistance.

The following table describes the information shown in the Production Availability Information section of the page.

Field	Description
Month	The calendar month for which the availability information is provided.
Availability(%)	The percentage of time during the specified month that the Oracle CRM On Demand production environment was available. **NOTE:** Availability information is provided approximately mid-month for the previous calendar month. On rare occasions, the availability information can be changed after it is first provided.

In the Service Information page, the maintenance schedule information for the production environment and the staging environment are shown in two separate sections.

The following table describes some of the information shown in the maintenance schedule sections of the page.

Field	Description
Maintenance Date	The date for the maintenance session. Dates in the future indicate planned maintenance sessions, and they are subject to change.
Estimated Start Time	The estimated time that the session will start. The time shown is the time in your local time zone.
Estimated Duration (hrs)	An estimate of the length of time the session will take, shown in hours.
Maintenance Type	The type of maintenance that was or will be performed, for example, standard maintenance or a patch installation. **NOTE:** If the date for the maintenance session is in the future, the maintenance type information is subject to change.
Last Updated Date	The date on which the Service Information page was last updated.

NOTE: From the Service Information page, a Diagnostics link provides access to diagnostics information. For security reasons, the information is encrypted. If you contact Oracle for assistance, you might be asked to click the Diagnostics link and to send the encrypted information to Oracle CRM On Demand Customer Care.

From the Service Information page, you can also access the release documentation. For more information, see Accessing Oracle CRM On Demand Release Documentation (on page 184).

Accessing Oracle CRM On Demand Release Documentation

You can access Oracle CRM On Demand release documentation from the Service Information page in Oracle CRM On Demand. The release documentation includes a set of release notes, the Administrator Preview Guide, and links to Transfer of Information courses, as well as configuration guides, administration guides, Web services guides, and various other guides.

To access Oracle CRM On Demand release documentation

1. Scroll to the bottom of any page in Oracle CRM On Demand, and click Service Information.
2. In the title bar of the Service Information page, click Release Documentation.

   The Oracle CRM On Demand Documentation page opens in a separate window, where you can access the documentation for various Oracle CRM On Demand releases. You can also optionally download a zipped file containing all of the documentation for a release.

About Enabling and Disabling Customized Code and the Customized Code Indicator

Your company can add customized code to the pages in Oracle CRM On Demand. For example, your administrator can create Web applets that contain customized code, and embed these applets in Homepages, in Detail pages, and in the Action bar. Your administrator can also add custom HTML head additions to customize pages in Oracle CRM On Demand, for example, to add a custom button to a record Detail page.

If you experience a technical issue while working in Oracle CRM On Demand, then you might want to disable all customized code to help you to troubleshoot the issue. If the issue no longer occurs when the customized code is disabled, then it is likely that the customized code is the cause of the issue. Also, if you contact Oracle for assistance, then you might be asked to disable all customized code to help troubleshoot the issue.

The Customized Code Enablement field in your personal profile allows you to disable all of the customized code in the pages that you access in Oracle CRM On Demand, and also to enable the customized code indicator. When the customized code indicator is enabled, one of the following messages appears at the bottom of each page that you access in Oracle CRM On Demand:

- **Customized code active.** Customized code is detected and is active in the current page.
- **Customized code not detected.** No customized code is detected in the current page.
- **Customized code disabled.** Customized code is detected for the current page, but the customized code is disabled.

The following options are available in the Customized Code Enablement field in your user profile:

- **Enabled.** This is the default setting in the standard application. When this option is selected, all of the customized code that is available in the pages in Oracle CRM On Demand is enabled, but the customized code indicator is not enabled.
- **Enabled with indicator.** When this option is selected, all of the customized code that is available in the pages in Oracle CRM On Demand is enabled. In addition, the customized code indicator is enabled.
- **Disabled with indicator.** When this option is selected, all of the customized code that is available in the pages in Oracle CRM On Demand is disabled. In addition, the customized code indicator is enabled.

NOTE: If the Disabled with indicator option is selected, then any reports and dashboards that are embedded in custom Web applets do not run for you.

NOTE: Changing the value in the Customized Code Enablement field in your user profile does not affect the behavior of the customized code or the customized code indicator for any other user. If the Customized Code Enablement field is not present on your Personal Profile page, then contact your administrator. Your administrator can either add the field to the page for you, or can update the field in your user profile. For more information about updating fields in your personal profile, see Updating Your Personal Details (on page 734).

When customized code is active in a page, the customized code is visible in the source code for the page, with comments to mark the start and end of the customized code. When the customized code is disabled, the customized code is not included in the source code for the page. Instead, the source code includes a comment to indicate that the customized code is disabled.

NOTE: After you finish troubleshooting an issue, you can enable the customized code again by changing the value in the Customized Code Enablement field in your personal profile to Enabled, or Enabled with Indicator.

Retrieving Your User Sign-In ID or Resetting Your Password

If you forget your user sign-in ID, you can submit a request from the Oracle CRM On Demand sign-in page to have the information sent to you in email. If you forget your password, you can submit a request to reset your password, also from the Oracle CRM On Demand sign-in page, provided that your user role has the Reset Personal Password privilege.

If you forget both your user sign-in ID and password, you can retrieve your user sign-in ID and then use that information, together with the security questions that you set up in Oracle CRM On Demand, to reset your password.

When retrieving your user sign-in ID or resetting your password, note the following points:

- To retrieve your user sign-in ID, you must know the primary email address that is stored on your user record in Oracle CRM On Demand. If you have problems retrieving your user sign-in ID, contact your company administrator to verify the primary email address.
- To reset your password, you must know your user sign-in ID. Therefore, if you forget both your password and your user sign-in ID, retrieve your user sign-in ID first, and then use that information to reset your password.
- To reset your password, you must know the answers to the security questions that you set up in Oracle CRM On Demand.
- Each time your user sign-in ID is sent to you, an entry is created in the audit trail on your user record.
- Each time you reset your password, an entry is created in the audit trail on your user record.

To retrieve your user sign-in ID

1. On the Oracle CRM On Demand sign-in page, click the Can't Access Your Account? link.
2. On the Select an Option page, click the I Forgot My User Sign In ID link.
3. Enter the primary email address that is stored on your user record in Oracle CRM On Demand, and then click Go.

   Depending on the email address you enter, the following happens:

   - If the email address you enter is syntactically correct, a confirmation message appears, otherwise, an error message appears.
   - If the email address you enter is the correct primary address on your user record, an email containing your user sign-in ID is sent to the email address.

- If the email address you enter is syntactically correct, but is not the correct primary address on your user account, no email is sent to you. In that case, contact your company administrator to verify the correct primary email address.

  NOTE: If you have more than one account in Oracle CRM On Demand, the active user sign-in ID for each account is included in the email, unless the account is configured for Single Sign-On only. If you do not know whether your account is configured for Single Sign-On only, contact your company administrator to find out.

  When you receive the email containing your user sign-in ID, if you know your password, you can return to the sign-in page and sign in to Oracle CRM On Demand as usual.

NOTE: You can submit up to three requests to have your user sign-in ID sent to you in any 24 hour period.

If you forget your password, you can reset it as described in the following procedure.

To reset your password

1. On the Oracle CRM On Demand sign-in page, click the Can't Access Your Account? link.
2. On the Select an Option page, click the I Forgot My Password link.
3. On the Forgot Your Password page, enter your user sign-in ID, and then click Go.

   If you enter the correct user sign-in ID, a confirmation message appears and you receive an email containing a temporary link to Oracle CRM On Demand.
4. To access Oracle CRM On Demand, click the temporary link in the email.

   NOTE: Your company administrator determines how long the temporary link remains valid, as well as the number of times you can attempt to sign in using the temporary link.
5. On the Reset Password page, enter the answers to your security questions and click Submit.
6. On the Password Update page, in the New Password field, enter a new password, then enter the same new password again in the Verify New Password field.
7. Click Save to save your new password.

NOTE: Your company administrator determines how many times you can reset your password in a given period of time.

About Oracle CRM On Demand Session Duration

Your company administrator can specify the maximum duration for an Oracle CRM On Demand active session for your company. If your interactive user session reaches the specified maximum duration, then the next time that you perform an action in Oracle CRM On Demand, such as clicking a link, tab, or button, you are returned to the sign-in page, and you must sign in again to return to the page that you were trying to access. When using Web services, if the active session times out, then the Web services client must send a new authentication request to continue using Web services.

The Company Idle Timeout setting on the company profile determines the time allowed in minutes before a user session ends because of inactivity. Your administrator can also optionally configure a warning window to appear a certain amount of time before a session ends because of inactivity. Clicking OK on the warning window sets the idle timeout counter. If you do not click OK before the idle timeout limit is reached, then your session ends.

About Concurrent Sessions in Oracle CRM On Demand

Your company administrator can specify whether concurrent sessions are allowed. *Concurrent sessions* occur when the same user credentials are used to sign in to Oracle CRM On Demand more than once, from different browsers, at the same time. Only interactive user sessions are counted. Connections to Oracle CRM On Demand through Web services or desktop clients are not considered when concurrent sessions are counted.

Your company administrator specifies whether concurrent sessions are allowed. The following table shows the behavior that users see when an attempt is made to sign in to Oracle CRM On Demand with user credentials that are already in use for at least one existing session, depending on the option your company administrator chooses.

Option	Behavior
Allow with Notification	The new session is allowed. When the user signs in to the new session, the following happens: - In the new session, a message appears on the Oracle CRM On Demand page to indicate that at least one other concurrent session exists. The message contains a link that the user can click to view the sign-in history for the user. - In each existing concurrent session, the next time the user performs an action in Oracle CRM On Demand, such as clicking a link, tab, or button, a message appears on the Oracle CRM On Demand page to indicate that a concurrent session has started. The message contains a link that the user can click to view the sign-in history for the user.
Allow without Notification	The new session is allowed. No notification is given in the new session or in any existing session to indicate that a concurrent session is in progress.
Prevent and Terminate Existing	The new session is allowed, but the existing session is terminated. When the user signs in to the new session, the following happens: - In the new session, a message appears on the Oracle CRM On Demand page to indicate that another session with the same credentials will be terminated. The message contains a link that the user can click to view the sign-in history for the user. - In the original session, the next time that the user performs an action in Oracle CRM On Demand, such as clicking a link, tab, or button, the user is returned to the sign-in page, where a message indicates that the session was terminated because another user signed in with the same credentials.

System Requirements for Oracle CRM On Demand

You can find details of the system requirements for Oracle CRM On Demand on the Oracle CRM On Demand Web site.

Release Notes for Oracle CRM On Demand

A set of release notes is provided with each release of Oracle CRM On Demand. The release notes outline minor changes to Oracle CRM On Demand, which change the existing behavior or the user interface. You can access the release notes and other release documentation from the Service Information page in Oracle CRM On Demand. For more information, see Accessing Oracle CRM On Demand Release Documentation (on page 184).

The release notes are also provided on the Training and Support Center Web site, which you can access by clicking the Training and Support global link at the top of each page in Oracle CRM On Demand.

Contacting Oracle

Oracle offers a variety of services and welcomes your suggestions about this application. Use the following resources to:

- Suggest improvements to the product, our services, or our processes at https://ebusiness.siebel.com/OnDemandCustomerCare/
- Request sales collateral or information about our new products and promotions at http://www.crmondemand.com/

Exiting Oracle CRM On Demand

CAUTION: Before exiting Oracle CRM On Demand, explicitly save all information, and close all the open windows, such as forms for creating new records.

To exit Oracle CRM On Demand

- In the top-right corner of your Oracle CRM On Demand page, click Sign Out.

When signing out of Oracle CRM On Demand, consider the following:

- It is recommended that you always use the Sign Out link to exit Oracle CRM On Demand so that your session will be terminated. If you close the browser window to exit Oracle CRM On Demand instead of clicking the Sign Out link, then your session remains open until it times out after a specified idle timeout interval. The idle timeout interval is a company-wide setting and is usually configured for 60 minutes.
- It is recommended that you close all of your open browser windows and tabs after you sign out of Oracle CRM On Demand, to help to protect your company's information.

2 Calendar and Activities

Use the Calendar pages to review, create, and update your activities and to review and update your planned calls.

An *activity* consists of tasks you need to accomplish before a certain date and appointments you want to schedule for a specific time. Tasks and appointments can be meetings, calls, demonstrations, or events. The difference between tasks and appointments is that tasks appear in a task list and have a due date and status, whereas appointments are scheduled on your calendar with a specific date and time.

A *planned call* is a Life Sciences specific call that you create with a status of Planned in order to tentatively have a place holder for a sales call to a physician, hospital, or clinic. Planned calls appear on the calendar and in the Planned Calls section on the Calendar pages.

The color coding that is used in the Planned Calls section on the Calendar pages is determined by the theme that you use, as follows:

- Overdue planned calls with a start date that is in the past appear in the color that your administrator selects for the alert text in the theme.
- Upcoming planned calls with a start date that is in the future appear in the color that your administrator selects for the page links in the theme.

Planned calls are not visible by default on your calendar. To see planned calls on your calendar, your user role must include the Life Sciences privilege Calls: Calendar Planned Calls.

About Calendars and Theme Styles

Two theme styles are available in Oracle CRM On Demand: the classic style and the modern style. The theme style is one of the features that determine the appearance of the Calendar pages. For example, the icons for the daily, weekly, and monthly view are different in the classic and modern theme styles. The following table describes some of the other differences in the Calendar pages in the theme styles.

NOTE: The instructions provided in the online help typically reflect the themes that have the classic style.

Calendar Feature	Classic Style	Modern Style
Layout of the daily calendar view	■ Half-hour time slots are not indicated. ■ The start and end dates and times are not shown for appointments that span multiple days.	■ Half-hour time slots are indicated by thin lines. ■ Appointments that span multiple days are shown at the top of the daily calendar view. The start and end dates and times of the appointments are shown. If there are more than five appointments that span multiple days, then you can scroll to see the additional appointments. ■ If there are appointments in time slots outside of the time slots that are shown for the day, then up and down arrows are shown as

Calendar Feature	Classic Style	Modern Style
		necessary. You can click the arrows to see more appointments.
Layout of the weekly calendar view	■ The days of the week are shown on the left of the calendar view. ■ The hours of the day are not shown. ■ The appointments for a day are listed in the row for that day. ■ For appointments that span multiple days, the start and end times are shown. The start and end dates are not shown.	■ The days of the week are shown at the top of the calendar view. ■ The hours of the day are shown on the left of the calendar view. ■ The details of an appointment are shown in the time slot or slots in which the appointment occurs. If some of the details are not visible, then you can rest your pointer on the entry to see the details. ■ Appointments that span multiple days are shown at the top of the weekly calendar view. The start and end dates and times of the appointments are indicated. If there are more than five appointments that span multiple days, then you can scroll to see the additional appointments. ■ If there are appointments in time slots outside of the time slots that are shown for the days of the week, then up and down arrows are shown as necessary. You can click the arrows to see more appointments.
Layout of the monthly calendar view	For appointments that span multiple days, the start time is shown in the cell for the start date.	Appointments that span multiple days are shown across the slots for the relevant days in the monthly calendar view. The start and end times are shown. However, if the start date is in a previous month, then the start date and a left arrow are shown instead of the start time. If the end date is in a future month, then the end date and a right arrow are shown instead of the end time.
Access to other calendar views	■ In the User tab, you can access the calendars of other users in your group and users who share their calendar with you. ■ In the Group tab, you can view a combined calendar for the members of your group, as well as any custom group calendar views that you set up. ■ In the Group Tasks tab, you can view a list of the tasks assigned to your group. ■ The My Calendar button returns you to your own calendar from the calendar of another user.	A menu provides the following options: ■ Group Calendar. View a combined calendar for the members of your group, as well as any custom group calendar views that you set up. ■ Group Tasks. View a list of the tasks assigned to your group. ■ User Calendar. View the calendars of other users in your group and users who share their calendar with you. ■ My Calendar. Return to your own calendar from the calendar of another user. Your current view determines which options are available in the menu.

<table>
<tr><th>Calendar Feature</th><th>Classic Style</th><th>Modern Style</th></tr>
<tr><td>Creating new appointments</td><td>To open the Appointment Edit page, where you can enter the details of the new appointment, do one of the following:
Click New Appointment.
In the weekly or monthly view of your own or another user's calendar, click the plus icon (+) for the day on which you want to create the appointment.</td><td>To open the Appointment Edit page, where you can enter the details of the new appointment, do one of the following:
In your own calendar, or another user's calendar, or a group calendar, click New.
In the daily or weekly view of your own or another user's calendar:
Double-click the time slot. By default, the new appointment starts at the start time of the time slot you clicked, and the duration is 60 minutes. You can change the details.
Double-click the space at the top of the calendar view, where the appointments that span multiple days are shown. (If you are in the weekly calendar view, double-click directly below the day that you want the appointment to start.) By default, the new appointment starts at 12 P.M. on the day that you clicked, and the duration is 1440 minutes (24 hours). You can change the details.
In the monthly view of your own or another user's calendar, double-click the space for the day. By default, the new appointment starts at 12 P.M. on that day, and the duration is 60 minutes. You can change the details.</td></tr>
</table>

<table>
<tr><th>Calendar Feature</th><th>Classic Style</th><th>Modern Style</th></tr>
<tr><td>Editing appointments

NOTE: For information about rescheduling an appointment by dragging it and dropping it within a calendar view, see About Dragging and Dropping Appointments in the Calendar (on page 202).</td><td>In the daily, weekly, or monthly calendar view, do one of the following:
To open the Appointment Edit page, click the Edit link in the appointment.
To open the Appointment Detail page, click the subject link in the appointment.</td><td>In the daily, weekly, or monthly calendar view, do one of the following:
To open the Appointment Edit page, double-click the appointment, or right-click the appointment, and then select Edit.
To open the Appointment Detail page, click the subject link in the appointment.

In the daily or weekly calendar view, you can also quickly change the start time or end time of an appointment that does not span multiple days, by clicking and dragging the border of the appointment, as follows:
To change the start time, click the upper border of the appointment and drag it to a time slot.
To change the end time, click the lower border of the appointment and drag it to a time slot.

NOTE: When you drag the border of an appointment to a time slot, the border always aligns with the start or end of the 30-minute time slot. You cannot drag the border of an appointment to a time within a time slot.
The new start and end times must allow the appointment to start and end within the same day as the existing appointment.</td></tr>
<tr><td>Saving appointments as iCalendar files</td><td>In the daily, weekly, or monthly calendar view, click the Save as iCalendar link in the appointment.</td><td>In the daily, weekly, or monthly calendar view, right-click the appointment, and then select Save as iCalendar.</td></tr>
<tr><td>Deleting appointments</td><td>In the daily, weekly, or monthly calendar view, click the subject link in the appointment to open the Appointment Detail page, and then click Delete.</td><td>In the daily, weekly, or monthly calendar view, do one of the following:
Right-click the appointment and then select Delete.
Click the subject link in the appointment to open the Appointment Detail page, and then click Delete.</td></tr>
</table>

TIP: In themes that have the modern style, overlapping appointments are shown side-by-side in the daily and weekly calendar views. If there are multiple appointments in a time slot, then some of the appointments might not be shown. If there are more appointments in a time slot than can be shown in the weekly calendar view, then you can change to the daily calendar view to see additional appointments. If there are more appointments in a time slot than can be shown in the daily calendar view, then you can view the appointments in a list. For information about viewing lists of appointments, see Working with Activity Lists (on page 203).

Color Coding by Appointment Type

In both modern and classic theme styles, depending on how your administrator sets up the theme that you use, the background and text colors for some or all of the appointments in your calendar views might be determined by the appointment type. If your administrator sets up color coding for any of the appointment types for your theme, then a key to the color coding appears at the bottom of your calendar views, showing the background colors that are assigned to those appointment types. If an appointment type does not have any custom colors assigned to it, then appointments of that type are shown in the default colors for your theme. The color coding is used in the daily, weekly, and monthly views of your own calendar and the individual calendars of other users who share their calendar with you.

NOTE: The color coding that is used for the text in the Planned Calls section of the Calendar pages is not determined by the color coding for appointment types. For information about the color coding that is used for planned calls, see Calendar and Activities (on page 189).

Background Colors for Time Slots

The settings for work days and business hours, as well as the type of theme that you use, determine the background colors for time slots in some of the calendar views. The settings for work days and business hours can be specified at company level and at user level. For more information, see About Calendar Work Days and Business Hours (on page 193).

About Calendar Work Days and Business Hours

The default work days and business hours for your company are specified on the company profile. If you want your calendar to show different work days and business hours, then you can select the work days and specify the business hours that you want in your default calendar settings. For more information, see Setting Your Default Calendar View (on page 224).

In your own calendar and in the individual calendars of other users who share their calendar with you, in the weekly view, you can switch between viewing the full calendar week and viewing only the days that are specified as work days. If you use a classic theme, then you can use the Show Full Week and Show Work Week links to switch between the views. If you use a modern theme, then you can use the Full Week and Work Week menu options to switch between the views.

If you use a classic theme, then in the daily view, you can switch between viewing the full day and viewing only the business hours.

The settings for work days and business hours, as well as the theme that you use, determine the background colors for time slots in some of the calendar views, as follows:

- For modern themes, in the daily and weekly views of your own calendar and the calendars of other users who share their calendar with you, three different background colors are used, with one color for each of the following:
  - The business hours on work days.
  - The non-working hours, including all of the hours on days that are not work days, as well as the hours outside of business hours on work days.
  - The business hours on the current day.
- For classic themes, in the daily and weekly views of your own calendar and the calendars of other users who share their calendar with you, the background colors are as follows:
  - In the daily view, two different background colors are used, with one color for each of the following:
    - The business hours on work days.
    - The non-working hours, including all of the hours on days that are not work days, as well as the hours outside of business hours on work days.
  - In the weekly view, three different background colors are used, with one color for each of the following:
    - The work days.
    - The days that are not work days.
    - The current day.

NOTE: The work days and business hours are the same in your views of your own calendar and your views of the calendars of other users who share their calendar with you, even if those users specify different work days and business hours for their own calendar views. So, if you select work days that are different from the company-wide settings, then the work days that you select are reflected in your views of your own calendar and your views of the calendars of other users. Similarly, if you specify business hours that are different from the company-wide business hours for your calendar, then your specified business hours are reflected in your views of both your own calendar and the calendars of other users.

The settings for work days and business hours are not reflected in the background colors for time slots and days in the monthly view in your own calendar and your views of the individual calendars of other users who share their calendar with you. In the monthly view, only the current day is shown with a background color that is different from the other days in the month.

For information about how business hours are shown in group calendar and custom calendar views, see Viewing the Calendars of Other Users (on page 222).

Working with the Calendar Pages

The Calendar pages provide the main area for managing activities. The default page is the Daily Calendar page, which contains a Daily Calendar section, a Calendar View section, a section that displays the Open Tasks list, and a Planned Calls section.

To see the Planned Calls section on the Calendar page, your user role must include the Calls: Calendar Planned Calls privilege. The Planned Calls section lists up to two weeks of planned calls for the sales representative in chronological order and displays the following information for each planned call: call date and start time, time of day, subject, contact to be visited, and other contact address information. The two week range for the listed planned calls includes the planned calls for the previous week and the planned calls for the upcoming week.

The color coding that is used in the Planned Calls section on the Calendar pages is determined by the theme that you use, as follows:

- Overdue planned calls with a start date that is in the past appear in the color that your administrator selects for the alert text in the theme.
- Upcoming planned calls with a start date that is in the future appear in the color that your administrator selects for the page links in the theme.

For more information about creating a planned call, see Tracking Visits (Sales Calls) to Customers (on page 208), Dropping Samples During a Sales Call (on page 558), and Mass Call Planning (on page 213).

You can:

- Select the calendar view that you want to display each time that you click the Calendar tab.
- Select the activity list that you want to display in the daily and weekly views of your own calendar and the individual calendars of other users who share their calendar with you (the daily and weekly user calendar views).
- Specify which day is shown as the first day of the week in your calendar.
- Specify a set of work days and business hours that are different from the default work days and business hours for your company.
- Choose to display additional information in the appointments in your calendar views.

For information about setting up these calendar options, see Setting Your Default Calendar View (on page 224).

NOTE: If your role includes the Share Calendar privilege, your Calendar pages might provide additional functionality than that listed on the default page. For more information on additional functionality, see Calendar Settings Page (on page 224).

The following table describes what you can do from the daily and weekly user calendar views.

To do this	Follow these steps
Create a task	Click New in the title bar of the activity list section. On the Task Edit page, enter the task information and save the record.
Delete a task	Click the link for the task that you want to delete. On the Task Detail page, click Delete.
Create an appointment	Click New Appointment in the Calendar title bar. On the Appointment Edit page, enter the appointment information and save the record.
Delete an appointment	Click the link for the appointment that you want to delete. On the Appointment Detail page, click Delete.
Go to a specific day	Click the day link in the Calendar View section. Alternatively, you can click the 1 icon above the appointments and then use the arrows in the heading of the Daily Calendar section to scroll to the day that you want to view.
Go to a specific month	Click the arrows in the Calendar View section. Alternatively, you can click the 31 icon above the appointments and then use the links or arrows in the heading of the monthly calendar view to go to the month that you want to view.
Hide the Calendar View and activity list sections	Click the right-arrow icon that appears above the Calendar title bar. When the Calendar View and activity list sections are hidden, the calendar area expands to provide more space for displaying details of the appointments in the calendar. This feature is useful if you want to print the calendar page (using the Printer Friendly link) and you do not want the Calendar View and activity list sections to appear on the printed page. To show the Calendar View and activity list sections again, click the left-arrow icon. After you hide the Calendar View and activity list sections, they remain hidden until you show them again, or until you sign out of Oracle CRM On Demand and then sign in again. The Calendar View and activity list sections are available in the daily and weekly user calendar views only.
Mark a task as completed	In the activity list section, click the Show Full List link to open the Activities List page. If a list of open tasks is not displayed by default when the Activities List page opens, then select the list of tasks that you want from the drop-down list of lists. In the task list, click the Subject link for the task you want to mark as completed. On the Task Detail page, click Mark as Completed.
Page through the Calendar day by day	Click the arrows in the Daily Calendar section.
Reschedule an appointment by dragging and dropping it	Drag the appointment and drop it in a different time slot or day. For more information, see About Dragging and Dropping Appointments in the Calendar (on page 202).

To do this	Follow these steps
Update an activity	Click the link for the activity (appointment, task, or planned call) that you want to update. On the Appointment Detail, Task Detail, or Call Detail page, edit the fields inline or click Edit to open the Appointment, Task, or Call Edit page. For more information on updating records, see Updating Record Details (on page 115). **TIP:** If you use a modern theme, then you can right-click an appointment in the daily, weekly, or monthly calendar view, and then click Edit to update the appointment.
View a list of appointments, tasks (open, closed, or all), activities, or planned calls	In the activity list section, click the Show Full List link. On the Activities List page, click the drop-down list and change the selection.
View the day's appointments	Click the 1 icon in the Calendar.
View the details of an activity	Click the link for the activity (appointment, task, or planned call) that you want to view.
View the entire month's appointments	Click the 31 icon in the Calendar.
View the entire week's appointments	Click the 7 icon in the Calendar.

Related Topics

See the following topics for related information:

- About Calendars and Theme Styles (on page 189)
- About Calendar Work Days and Business Hours (on page 193)

Managing Calendars and Activities

For step-by-step procedures for managing calendars and activities, see the following:

- Viewing Activities (on page 197)
- Creating Activities (on page 199)
- Updating Activities (on page 201)
- Removing Users From Activities (on page 201)
- Limiting Activity Records Displayed (on page 207)
- Marking Tasks as Completed (on page 208)
- Assigning Activities to Another Employee (on page 208)
- Tracking Visits (Sales Calls) to Customers (on page 208)
- About Event and Appointment Synchronization (on page 228)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Adjusting Message Responses (on page 216)
- Scheduling Appointments with Others (on page 218)
- Saving Appointments as iCalendar Files (on page 220)
- Mass Call Planning (on page 213)
- Using Activity Assessment Scripts (on page 227)
- Setting Your Default Calendar View (on page 224)
- Reviewing Recommended Messaging Plans for Activities (on page 614)
- Creating Appointments for Multiple Accounts (on page 282)

If your user role includes the Share Calendar privilege, you can also perform the following procedures:

- Viewing the Calendars of Other Users (on page 222)
- Sharing Your Calendar (on page 224)
- Adding Custom Calendar Views (on page 226)

If your user role includes the Share Calendar privilege and your company uses the default group assignment option, you can also perform this procedure, Viewing Group Task Lists (on page 227).

If your user role includes the Maps Integration privilege, then you can also perform this procedure, Performing Proximity Searches (on page 364).

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about calendars and activities:

- About Calendars and Theme Styles (on page 189)
- About Calendar Work Days and Business Hours (on page 193)
- About Activity Reminders (on page 200)

Viewing Activities

Oracle CRM On Demand keeps your activities in the forefront by showing them on several pages:

- My Homepage

  My Homepage contains separate lists for your appointments and tasks, sorted by date.
- Calendar

  The daily view of your own calendar shows your appointments as they would appear in an appointment book, opened to today's schedule. You can review other days by using the monthly calendars on the right or by clicking the 1, 7, and 31 icons above the appointments to see the desired calendar view.

  In the standard application, the Open Tasks list is displayed in the daily and weekly views of your own calendar and the individual calendars of other users who share their calendar with you (the daily and weekly user calendar views). This list shows up to ten of your tasks for the next 30 days (Due Date <= Today +30), sorted by the due date by default.

NOTE: You can select a different list to be displayed, or your administrator can select a different list for your user role. For more information, see Setting Up Your Calendar (on page 759).

- Detail page for record types, such as Accounts, Contacts, and so on.

  The Detail pages can contain related information sections that show the activities that are linked to a specific record. The following table describes the related information sections that you might see for activities in a record Detail page. In all cases, you see only the records to which you have visibility.

List	Records Displayed
Activities	■ The linked tasks on which the completed date is blank. ■ The linked appointments on which the completed date and time are later than the current date and time. ■ The linked tasks on which the completed date and time are earlier than the current date and time. ■ The linked appointments on which the completed date and time are earlier than the current date and time.
Completed Activities	■ The linked appointments on which the completed date and time are earlier than the current date and time. ■ The linked tasks on which the completed date and time are earlier than the current date and time.
Open Appointments	The linked appointments where the value in the Completed Date field is not in the past. **NOTE:** If the Completed Date field is not populated by the user who creates the appointment, then it is automatically populated with the same value as the End Time field of the appointment. When an appointment's completed date is reached, the appointment is removed from the Open Appointments list and becomes part of the Completed Activities list. The information in the Open Appointments and Completed Activities related information sections of the parent record's Detail page is updated when the page is refreshed. The records in the Open Appointments list are sorted by the date and time in the Start Time field, with the appointment that has the earliest start date and time appearing first in the list.
Open Tasks	The linked tasks that do not have a value in the Completed Date field or a status of Completed, provided that your company uses the default set of values for the Status field. **NOTE:** When a task is marked as completed, the Completed Date field is automatically populated with the date and time in the time zone of the user who marks the task as completed. Users can also populate the Completed Date field on a task manually. When the Completed Date field on a task is populated, the task is removed from the Open Tasks list and is included in the Completed Activities list.

List	Records Displayed
	The information in the Open Tasks and Completed Activities related information sections of the parent record's Detail page is updated when the page is refreshed. The records in the Open Tasks list are sorted by the Due Date field, with the task that has the earliest due date appearing first in the list.
Open Activities	A combination of the Open Appointments and Open Tasks lists. **NOTE:** The records in the Open Activities list are sorted by the Completed Date field. Records on which the Completed Date field is blank appear at the bottom of the Open Activities list. Therefore, open tasks appear at the bottom of the Open Activities list, after all open appointments. If you do not want the related open tasks and open appointments on a record Detail page to appear in this order, then it is recommended that your company administrator adds the Open Tasks and Open Appointments related information sections to your record Detail page instead of the Open Activities related information section.

About Managing Tasks

One way of managing tasks is to prioritize them by importance or urgency. You prioritize a task by assigning it a level, such as 1-High, 2-Medium, or 3-Low. The task priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority. You change the priority level of a task on the Task Edit page. The default priority for a task is 3-Low.

TIP: Tasks appearing in red in the Open Tasks section of My Homepage, and in task lists in the daily and weekly user calendar views are past their due date. Tasks that are past their due date do not appear in red in other pages such as the list page that opens when you click Show Full List in the Open Tasks section of My Homepage.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values (on page 1254).

For information about the Group Task List tab, available for companies that use the Group feature, see Viewing Group Task Lists (on page 227).

Creating Activities

You always create an activity (task or appointment) by entering information in a form. You can access this form from different areas within the application, depending on what you are working on and what you need to do.

This section describes one method for creating an activity, which allows you to add the record while continuing with your work in the main area of the application. For a description of all the methods, see Creating Records (on page 51).

To create an activity using the Create section of the Action bar

1 In the Create section of the Action bar, click Appointment or Task.
2 In the form, enter the activity information.
   For information about the fields in activity records, see Activity Fields (on page 229).
3 Save the record.

Related Topics

See the following topics for related information:

- Activity Fields (on page 229)
- Working with the Calendar Pages (on page 194)
- About Activity Reminders (on page 200)
- Adding Emails from Microsoft Outlook and Lotus Notes (on page 771)

About Activity Reminders

If a reminder is configured for an activity, then at the specified time, reminders are sent to the activity owner and to each user in the list of users on the activity, if the Activity Notification field settings at user level or at company level allow activity notifications to be sent to the user.

NOTE: If the Delegated By field is populated on an activity, and if a reminder is configured for the activity, then the reminders are sent to the user specified in the Delegated By field, as well as to the activity owner and the other users on the activity. If you create an activity for another user, or if the Delegated By field on an existing activity is blank when you assign the activity to another owner, then your name automatically appears in the Delegated By field after you save the activity. If you do not want to receive the reminders for that activity, then you must delete your name from the Delegated By field.

Reminders can be sent as email, or displayed in a pop-up window, or both, depending on the value that is selected in the Activity Notification field. For information about the Activity Notification field, see Setting Your Default Calendar View (on page 224).

About Email Reminders

Email reminders are sent in the user's language. The subject of the activity is displayed in the subject line of the email. In an email reminder for an appointment, the message includes information from the Subject, Start Time, Status, and Description fields on the appointment. It also includes the names of the contacts who are linked to the appointment, the name of the account that is linked to the appointment, if one exists, and a link to the Detail page of the appointment in Oracle CRM On Demand.

In an email reminder for a task, the message includes information from the Subject, Due Date, Priority, Status, and Description fields on the task. The email message also includes a link to the Detail page of the task in Oracle CRM On Demand.

About Pop-up Reminders

Pop-up reminders are displayed in the Activity Reminder pop-up window, which opens when a reminder is due. In a pop-up reminder for an appointment, the start date and time, and the subject are displayed. In a pop-up reminder for a task, the icon indicating the priority of the task (if applicable), the due date, and the subject are displayed. If multiple reminders are due, then the reminders are sorted by the date and time, with the activity that is due first at the top of the list.

The first time the Activity Reminder pop-up window opens after you sign in to Oracle CRM On Demand, it displays the reminders that became due since you last signed out of Oracle CRM On Demand. If any alert windows appear when you sign in, then you must close the alert windows before you can interact with the Activity Reminder pop-up window.

In the Activity Reminder pop-up window, you can do the following:

- Use the Snooze feature to defer a reminder for a specified period. The reminder appears again after the specified period.
- View the record details, by clicking the subject link in the reminder.
- Dismiss all reminders. When you click Dismiss All, all of the reminders are removed from the Activity Reminder pop-up window and the window closes. The reminders do not appear again.

NOTE: Oracle CRM On Demand retrieves the details of the activities for which reminders are due every 30 minutes, and stores that information. If you reschedule an activity within 30 minutes of the reminder for that activity becoming due, then the reminder might be displayed based on the original schedule for the activity.

Updating Activities

You can update the information in the activity record, including changing the record status to completed, if you have edit access to the record.

NOTE: Users who have the View Private Activities privilege and the Can Read All Records setting for the Activity record type enabled in their user role have visibility to all activities that are marked private, regardless of the owner of the activity. The View Private Activities privilege does not allow a user to update or delete an activity that is marked private and is owned by another user. Users who have the Delete Any Activity privilege and the Can Read All Records setting for the Activity record type enabled in their role can delete activities that they do not own or activities that are marked private. Typically, the Delete Any Activity and View Private Activities privileges are given to company administrators only.

To update activity information

1. Select the task or appointment.

   For instructions on selecting activities, see Finding Records (on page 74).
2. On the Appointment or Task Detail page, edit the fields inline or click Edit to open the Appointment or Task Edit page. For more information on updating records, see Updating Record Details (on page 115).

Removing Users From Activities

To remove users from an activity, at least one of the following conditions must be true:

- You are the owner of the activity.
- Your name appears in the Delegated By field on the activity.

Otherwise, the Remove links are not available in the Users section of the Appointment Detail page or the Task Detail page and you cannot remove users from the activity. You can manually update the Delegated By field on the activity so that it shows your name. Then, after you refresh the activity Detail page, a Remove link is available for each of the users except the owner of the activity. For more information about the Delegated By field, see Activity Fields (on page 229).

To remove a user from an activity

1. In the Appointment Detail page or the Task Detail page, scroll to the Users section.
2. If the user that you want to remove does not appear in the list, then click Show Full List to expand the list.
3. Find the user that you want to remove, then click the Remove link for the user, and then confirm that you want to remove the user.

NOTE: The Remove links are also available in the multiassociation window that opens when you click Add in the Users section of the page, if you are the owner of the activity or your name appears in the Delegated By field on the activity.

About Dragging and Dropping Appointments in the Calendar

If you have the necessary access levels to allow you to edit an appointment, then you can reschedule the appointment by dragging it and dropping it within a calendar view. For example, when you are working in the daily calendar view, you can drag an appointment to a different time slot within the same day. When you are working in the weekly calendar view, you can drag an appointment to a different day of the week that you are currently viewing.

The behavior for appointments that do not span multiple days is as follows:

- **Daily calendar view.** You can drag an appointment and drop it in a different time slot within the same day. When you drop the appointment in the new time slot, the start time for the appointment is updated to the start time of the new slot. For example, if you drag an appointment that was due to start at 9:15 A.M. to the time slot that starts at 10:30 A.M., then the start time of the appointment is updated to 10:30 A.M. The end time of the appointment is automatically updated to the appropriate value, depending on the start time of the slot in which you drop the appointment and the duration of the appointment. For example, if you drag an appointment of 60 minutes duration and drop it in the time slot that starts at 10:30 A.M., then the end time of the appointment is updated to 11:30 A.M. The duration of an appointment remains the same after you move it.

  The new time slot must allow the appointment to start and end within the same day. For example, you cannot drag an appointment of 60 minutes duration and drop it in the time slot that starts at 11:30 P.M., because the end time for the appointment would not be within the same day as the start time.

  NOTE: If you use a classic theme, then a red line appears when you drag an appointment in the daily view. The red line indicates whether the time slot starts on the hour or the half-hour.

- **Weekly calendar view.** You can drag an appointment and drop it in a different day within the same week. The duration of the appointment does not change. If you use a classic theme, then you cannot change the time of day of the appointment by dragging and dropping the appointment within the weekly calendar view. The date of the appointment is updated when you drop the appointment in a different day, but the time of the appointment does not change.

  However, if you use a modern theme, then you can change the time of an appointment by dragging it and dropping it in a specific time slot in a day in the weekly calendar view. The start time and date, and the end time and date of the appointment are updated accordingly. The new time of day must allow the appointment to start and end within the same day. If there are more appointments within a time slot than can be shown in the weekly calendar view, then you might not see the appointment after you move it. You can change to the daily calendar view to see more appointments.
- **Monthly calendar view.** You can drag an appointment and drop it in a different day within the same month. The time of day and the duration of the appointment do not change. If you want to change the time or duration, then you must edit the appointment. If there are more appointments within a day than can be shown in the monthly calendar view, then you might not see the appointment after you move it. You can change to the daily or weekly calendar view to see more appointments.

NOTE: If you want to change the duration of an appointment, and if you use a classic theme, then you must edit the appointment. However, if you use a modern theme, then you can quickly change the start time or end time of an appointment in the daily or weekly calendar view, by clicking and dragging the border of the appointment. For more information about editing appointments in modern themes, see About Calendars and Theme Styles. To change the duration of an appointment in the monthly calendar view, you must edit the appointment.

The behavior for appointments that span multiple days is as follows:

- **Daily calendar view.** You cannot drag an appointment that spans multiple days to a different day or time when using the daily calendar view.
- **Weekly calendar view.** Within the section that shows the appointments that span multiple days, you can drag an appointment and drop it in a different day within the week that is currently displayed, even if the appointment ends in a different week. The day in which you drop the appointment is the new start day for the appointment. For example, if you drag an appointment that starts at 10:30 A.M. on Monday March 21 and

ends at 10:30 P.M. on Wednesday March 23 and drop it in Tuesday March 22, then the appointment details change so that the appointment starts at 10:30 A.M. on March 22 and ends at 10:30 P.M. on March 24. If you want to change the time of day that the appointment starts or the duration of the appointment, then you must edit the appointment.

- **Monthly calendar view.** You can drag an appointment that spans multiple days and drop it in a different day within the month that is currently displayed, even if the appointment ends in a different month. The day in which you drop the appointment is the new start day for the appointment. For example, if you drag an appointment that starts at 10:30 A.M. on March 24 and ends at 10:30 P.M. on March 29 and drop it in March 31, then the appointment details change so that the appointment starts at 10:30 A.M. on March 31 and ends at 10:30 P.M. on April 05. If you want to change the time of day that the appointment starts or the duration of the appointment, then you must edit the appointment.

Working with Activity Lists

You can open the Activity List page from a record Detail page or from the activity list section of the daily and weekly views of your own calendar and the individual calendars of other users who share their calendar with you (the daily and weekly user calendar views) in the Calendar pages. The list of records that is shown when you open the Activity List page depends on how you access the page.

What Is Shown When You Open the Activity List Page from a Record Detail Page

When you open the Activity List page by clicking the Show Full List link in a list of activity records on a record Detail page, the Activity List page shows the activities that are linked to the record. The list can include open activities, completed activities, or a combination of both, as shown in the following table. In all cases, you see only the records to which you have visibility.

List	Records Displayed
Activities	• The linked tasks on which the completed date is blank. • The linked appointments on which the completed date and time are later than the current date and time. • The linked tasks on which the completed date and time are earlier than the current date and time. • The linked appointments on which the completed date and time are earlier than the current date and time.
Completed Activities	• The linked appointments on which the completed date and time are earlier than the current date and time. • The linked tasks on which the completed date and time are earlier than the current date and time.
Open Appointments	The linked appointments where the value in the Completed Date field is not in the past. **NOTE:** If the Completed Date field is not populated by the user who creates the appointment, then it is automatically populated with the same value as the End Time field of the appointment. When an appointment's completed date is reached, the appointment is removed from the Open Appointments list and becomes part of the Completed Activities list. The information in the Open Appointments and Completed Activities related information sections of the parent record's Detail page is updated when the page is refreshed.

List	Records Displayed
	The records in the Open Appointments list are sorted by the date and time in the Start Time field, with the appointment that has the earliest start date and time appearing first in the list.
Open Tasks	The linked tasks that do not have a value in the Completed Date field or a status of Completed, provided that your company uses the default set of values for the Status field. **NOTE:** When a task is marked as completed, the Completed Date field is automatically populated with the date and time in the time zone of the user who marks the task as completed. Users can also populate the Completed Date field on a task manually. When the Completed Date field on a task is populated, the task is removed from the Open Tasks list and is included in the Completed Activities list. The information in the Open Tasks and Completed Activities related information sections of the parent record's Detail page is updated when the page is refreshed. The records in the Open Tasks list are sorted by the Due Date field, with the task that has the earliest due date appearing first in the list.
Open Activities	A combination of the Open Appointments and Open Tasks lists. **NOTE:** The records in the Open Activities list are sorted by the Completed Date field. Records on which the Completed Date field is blank appear at the bottom of the Open Activities list. Therefore, open tasks appear at the bottom of the Open Activities list, after all open appointments. If you do not want the related open tasks and open appointments on a record Detail page to appear in this order, then it is recommended that your company administrator adds the Open Tasks and Open Appointments related information sections to your record Detail page instead of the Open Activities related information section.

What Is Shown When You Open the Activity List Page from a Calendar Page

When you open the Activity List page by clicking the Show Full List link in the Open Tasks list in the daily or weekly user calendar views, the list shows all open activities that are assigned to you.

NOTE: In the standard application, the Open Tasks list is displayed in the activity list section of the daily and weekly user calendar views. However, you can select a different list to be displayed, or your administrator can select a different list for your user role. If a different list is displayed in the calendar view, then when you click the Show Full List link, that list opens in the Activity List page. For information about selecting a different list to be displayed in the daily and weekly user calendar views, see Setting Up Your Calendar (on page 759).

Other lists are also available to you in the Activity Lists page. The set of lists that is available to you can include both the standard lists that are distributed with Oracle CRM On Demand and custom lists for your company. Your visibility to records is determined as follows:

- For all lists except the lists of delegated activities, your visibility to records is limited to those activities where your name appears in the Owner field or in the list of users, unless you have the View Private Activities privilege or the Delete Any Activity privilege in your role.

- For lists of delegated activities, your visibility to records is limited to those activities where your name appears in the Delegated By field.
- For all lists, the filter that is applied to the list determines which records are displayed in the list.

NOTE: If your company administrator added you to a group, then a Group Tasks tab appears on your calendar pages.

About Access to Private Activities in the Activity List Page

If you have the View Private Activities privilege and the Can Read All Records setting for the Activity record type enabled in your user role, then you have visibility to all activities that are marked private, regardless of the owner of the activity. The View Private Activities privilege does not allow you to update or delete an activity that is marked private and is owned by another user.

If you have the Delete Any Activity privilege and the Can Read All Records setting for the Activity record type enabled in your user role, then you can delete activities that you do not own or activities that are marked private. Typically, the Delete Any Activity and View Private Activities privileges are given to company administrators only.

What You Can Do From the Activity List Page

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

NOTE: If you access the Activity List page through a record Detail page, then some of these features may not be available.

To do this	Follow these steps
Add activities to books or remove activities from books	On the Activity List title bar, click Menu, and select Batch Assign book. Complete the steps described in Assigning Records to Books (on page 1454).
Create a new list of activities	On the Activity List title bar, click Menu, and select Create New List. Complete the steps described in Creating and Refining Lists (on page 130).
Create a task	On the Activity List title bar, click New Task. On the Task Edit page, enter the required information and save the record.
Create an appointment	On the Activity List title bar, click New Appointment. On the Appointment Edit page, enter the required information and save the record.
Delete all records from the list	On the Activity List title bar, click Menu, and select Batch Delete. Complete the steps described in Deleting and Restoring Records (on page 173).
Export the list	On the Activity List title bar, click Menu, and select Export List. Complete the steps described in Exporting Records in Lists (on page 143).
Find an activity (task or appointment)	Click the Subject column header to sort the data. Then click a letter in the alphabet bar. For activities beginning with numbers, click 0-9.
Manage all the activities lists	On the Activity List title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in Manage Lists Page (on page 140).

To do this	Follow these steps
Refine the search criteria for the list	On the Activity List title bar, click Menu, and select Refine List. Complete the steps described in Creating and Refining Lists (on page 130).
Restore a deleted list of records	On the Activity List title bar, click Menu, and select Batch Restore. For more information about restoring deleted lists of records, see Deleting and Restoring Records (on page 173).
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select a number of records to see at one time.
Update a group of activity records at once	On the Activity List title bar, click Menu, and select Mass Update. Complete the steps described in Updating Groups of Records (on page 150).
Update an activity	Edit fields inline on the Activity List page or select the activity to open the Details page. For more information on updating records, see Updating Record Details (on page 115).
View a subset of activities (tasks or appointments)	On the Activity List title bar, click the drop-down list and change the selection (Completed Tasks, Open Tasks, My Tasks, or My Appointments).
View all activities (tasks and appointments)	On the Activity List title bar, click the drop-down list and select All Activities.

Standard Activity Lists

The following table describes the standard lists.

Activity List	Filters
Completed Tasks	Tasks that have a completed date in the past
Delegated Tasks - Completed	Tasks that have your name in the Delegated By field and that have a completed date in the past
Delegated Tasks - Open	Tasks that have your name in the Delegated By field and that have a blank completed date or a completed date in the future
Delegated Tasks - Overdue	Tasks that have your name in the Delegated By field and that are overdue
My Activities	All of your activities, including tasks and appointments
My Appointments	All of your appointments

Activity List	Filters
My Daily Calls	Referral calls, review calls, or birthday calls to make today
My Open Tasks	Your tasks on which the Completed check box is not selected and that are due to be completed in the next 90 days
My Tasks	All of your tasks
My Weekly Calls	Referral calls, review calls, or birthday calls to make this week
Open Activities	Combined list of: ■ Tasks assigned to you that have a blank completed date or a completed date in the future ■ Future appointments that are assigned to you
Open Tasks	Tasks on which the Completed check box is not selected and that are due to be completed in the next 90 days
Planned Calls	Your planned calls **NOTE:** This list is specific to Oracle CRM On Demand Life Sciences Edition.

Limiting Activity Records Displayed

You can limit the activities you see by selecting a filtered list. A list shows a subset of the activities that meet the criteria saved within the list.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Before you begin. When you create a list, you need to enter the fields and values for the criteria you set up. You might want to go to the Task Edit or Appointment Edit page and write down the exact field names and values as they are used in your application. Otherwise, your filtered list might not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names; however, the printout does not capture all of the available field values for drop-down lists.

To open a filtered list for activities

1. Click the Calendar tab.
2. On the Calendar Page, in the activity list section, click Show Full List.

   NOTE: The activity list section is available in the daily and weekly views of your own calendar and the individual calendars of other users who share their calendar with you.

3. On the Activities List page, change the selection in the drop-down list.

To create a filtered list for activities

1. Click the Calendar tab.

2 On the Calendar Page, in the activity list section, click Show Full List.
3 On the Activity Lists page, click Menu and select Manage Lists.
4 On the Manage Lists page, click the New List button.
5 Complete the steps described in Creating and Refining Lists (on page 130).

Marking Tasks as Completed

You can mark tasks as Completed. A completed task remains in certain lists, such as All Activities or My Activities. However, completed tasks do not remain on My Homepage.

If a task that you mark as completed is linked to a record, then the task moves from the list of open activities or tasks to the list of completed activities on the Detail page for that record.

To mark a task as Completed

1 Select the task.
   For instructions on selecting tasks, see Finding Records (on page 74).
2 On the Task Detail page, click the Mark as Completed button.
   After you mark a task as completed, Oracle CRM On Demand sets the Status field on the task to Completed, provided that your company uses the default set of values for the Status field.

Assigning Activities to Another Employee

You can assign an activity to another employee if you have edit access to the record. Generally, you can edit a record if you own it or the owner reports to you. However, access levels can be adjusted to restrict a user's access.

After you assign an activity to another employee, the activity automatically appears in the new user's My Activities or My Tasks list. The assigned activity also maintains all prior associations for the activity. If the Delegated By field is blank when you assign the activity to another owner, then your name automatically appears in the Delegated By field after the activity is reassigned. However, if the Delegated By field is already populated with the name of a user, then the field is not automatically updated when you reassign the activity. If necessary, you can manually update the field so that it shows your name or the name of any other user. You can use the lists of delegated tasks to track tasks that are not assigned to you but have your name in the Delegated By field. The lists of delegated tasks are available in the picklist of lists on the Activity Lists page.

To assign an activity to another employee

1 Select the activity.
   For instructions on selecting activities, see Finding Records (on page 74).
2 On the Appointment Detail or Task Detail page, position your cursor in the Owner field, and click the Lookup icon.
3 In the Lookup window, click the Select link beside the name of the new owner.
   The name of the new owner appears in the Owner field on the Appointment Detail or Task Detail page.

Tracking Visits (Sales Calls) to Customers

NOTE: This feature is available in Oracle CRM On Demand Life Sciences Edition only. In addition, the information in this topic assumes that your company uses the default set of values for the Status picklist field. However, if your administrator changes the standard set of values in the Status picklist field, then the activity processing in Oracle CRM On Demand might not work as described in this topic.

You can do the following in the Call Detail page:

- Track visits (sales calls) to customers, recording information such as the products you discussed, the samples, promotional or educational items you left, solutions you discussed, and related contacts. You can track visits (sales calls) to customers in one of the following ways:
  - By adding products detailed, samples dropped, sample request, and promotional item information to the parent call.
  - By adding attendees to the parent call and then tracking the products detailed, samples dropped, sample request, and promotional item information for each individual attendee record.

    NOTE: An *attendee* is an individual who is present for a meeting or phone call.

  If using attendees to track visits (sales calls) to customers, note the following:
  - All attendees will inherit any product detailed information recorded on the parent call.
  - Attendee information will not impact the primary contact information on the parent call.
- Save the information as a template, called a *Smart Call*. The Smart Call template is helpful when you are visiting multiple customers for the same purpose, such as enrolling clinical investigators. You can keep the template private or make it available for others to use (public).

  When you apply the Smart Call template to a new call, most information from the smart call automatically populates the new record, including the products detailed, promotional items dropped, and samples dropped information related to the call. However, other fields, such as Lot Numbers for the samples dropped, are not saved as part of the template.

  After you apply the Smart Call template to a call, you can then update the remaining fields to track the details of this visit.

  If your company administrator included the Last Call Date field on your Account or Contact Edit page, that field is automatically updated on the linked account and all linked contacts. The update occurs when you change the call record's status to Completed and save the record. The field reflects the start time and date of the call.

  NOTE: Oracle CRM On Demand Disconnected Mobile Sales can coexist with Smart Call configuration in Oracle CRM On Demand but does not support or respond to Smart Calls.

  For more information on Smart Calls, see Managing Smart Calls (on page 1875).
- Submit the call information for use in the reconciliation process for inventory periods.

  Oracle CRM On Demand Life Sciences Edition does the following after call detail information is submitted:
  - Sets the Call Activity status to Submitted.
  - Locks any Call Detail records with a status set to Submitted to prevent any changes or deletions of those records. For information about record locking for call activity records, see Configuration Guide for Oracle CRM On Demand Life Sciences Edition.
  - Creates a disbursement transaction that is used in the reconciliation process for the Inventory Period. For more information, see Reconciling an Inventory Period (on page 541), Process of Reconciling the Inventory (on page 545), Viewing Disbursement Transactions (on page 557).

  NOTE: If the call record does not contain a valid contact state license or an associated signature record, and the validation checks for these conditions have been set up by your administrator on the Life Science Related Preferences page, then Oracle CRM On Demand displays an error message and prevents the call submission. For information on the relevant preferences, see the information on Enable Contact State License Validation and Enable Signature Validation in Setting Life Sciences Related Preferences (on page 1878).

Limitations When Changing the Primary Contacts Used in Contact Calls

If you have saved a contact call and then change the primary contact used in the call, then the following occurs:

- The call is listed under the original primary contact and the new primary contact.
- The call uses the new primary contact in both places.
- The subject line remains the same in both calls.

The following example explains the outcome of changing the primary contact:

1. You create two contacts: Jack and Jill.
2. You create a contact call for contact Jack, Call_Jack.

   The primary contact is set to Jack in this call.
3. You change the primary contact in the Call_Jack call to *Jill.*

   Oracle CRM On Demand automatically creates a second call under contact Jill, but it uses the original subject (Call_Jack). The Call_Jack call is now listed under both contacts Jack and Jill. If required, you can change the subject line of the call listed under Jill to something more suitable such as *Call_Jill.*

Before You Begin:

- To add, edit or submit calls (account calls or contact calls), your role must include the Calls: Enable Call Detailing privilege.
- To manage access to calls and configure an automated call submission to the Oracle CRM On Demand Disconnected Mobile Sales application, your role must include the Calls: Manage Calls privilege. Typically, this privilege is given to company administrators only.

To track a visit (sales call) to a customer

1. On the Accounts or Contacts Homepage, open the account or contact for your visit.

   For instructions on selecting records, see Finding Records (on page 74).

   NOTE: You can plan a visit (sales call) for up to twenty five customers at one time by using the mass call planning feature in Oracle CRM On Demand. For more information about creating a planned call for multiple customers, see Mass Call Planning (on page 213).
2. On the Account Detail or Contact Detail page in the Calls section, click New Call or Auto Call to create a new call record.

   NOTE: If the Calls section is not visible on your Details page, click the Edit Layout link in the upper-right corner of the page, and add the Calls section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

   - Clicking New Call brings you to the Call Edit page where you must enter most information manually for the new call record.

     Make sure that you specify Call in the Type field. Otherwise, the following related items will not be available to you: Samples Dropped, Promotional Items, Products Detailed.
   - Clicking Auto Call brings you to the Call Detail page where the following field data is filled automatically in for the new call record:
     - The Status field has a value of Planned.
     - The End Date field has a value equal to the Start Date plus 30 minutes.
     - The Subject field has a value of Automated Call, and it shows the Account or Contact name.
     - The Type field has a value of Call.

     WARNING: Oracle CRM On Demand Life Sciences customers must not attempt to disable or customize Type=Call.
3. On the Call Edit or Call Detail page, do the following:
   a. To populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.
   b. Enter or update the information.

The table describing call record fields at the end of this procedure provides additional information regarding some of the fields.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help. Custom fields that your company administrator defined are saved in the Smart Call template.

4. Save the record by doing one of the following:
   - On the Call Edit page, click Save.
   - On the Call Detail page, click either Save as a Private Smart Call or Save as a Public Smart Call.

   For more information, see Saving Call Detail Information as a Template (on page 573).
5. Next, do one of the following on the Call Detail page as required:
   - Add products detailed, samples dropped, sample request, or promotional item line items to the parent call record.
   - Add an attendee line item to the parent call record, then add products detailed, samples dropped, sample request, or promotional item line items to the attendee record.

   For more information about these tasks, see the following topics:

   - Adding Attendees to Calls (on page 560)
   - Linking Product Detailed Information to Calls (on page 563)
   - Linking Samples Dropped Information to Calls (on page 566)
   - Linking Promotional Item Information to Calls (on page 568)
   - Linking Sample Request Information to Calls (on page 570)

6. Click Submit to submit the call detail information for processing, see Submitting Call Detail Information for Inventory Tracking.

Field	Description
Key Call Information	
Subject	Limited to 100 characters. The name of the Smart Call template.
Primary Contact	Automatically populated. If this call is linked to both an account and contact, the call record appears as related information on both the Account and Contact Detail pages. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Account	Automatically populated and read-only. If this call is linked to both an account and contact, the call record appears as related information on both the Account and Contact Detail pages. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Address	Displays the full address, which is taken from the individual address fields for the account or contact record. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.

Field	Description
Smart Call	If your user role includes the privilege, you can select a Smart Call template. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Status	Status of visit (call), which can be one of the following: Assigned, Completed, Deferred, In Call, In Chat, In Progress, Not Started, Planned, Signed, Submitted, Submitting, Waiting for Someone Else. Oracle CRM On Demand Life Sciences Edition uses the following status values when it is processing calls: - **Planned.** The call appears on the Calendar and in the Planned Calls section on the Calendar pages. To see planned calls on the Calendar and in the Planned Calls section on the Calendar page, your user role must include the Calls: Calendar Planned Calls privilege. - **Signed.** The content of the call has been acknowledged by the call recipient. Oracle CRM On Demand Life Sciences Edition locks the call, and you cannot make any further changes to the dropped samples, dropped promotional items, or sample requests for the call. - **Submitted.** Oracle CRM On Demand Life Sciences Edition has processed the call and created transactions for reconciliation after the user has clicked Submit on the Account Call Detail or Contact Call Detail page. - **Submitting.** The Oracle CRM On Demand Disconnected Mobile Sales application sets this status, which triggers workflow rules that your company administrator configures to update the call record. The Submitting status and workflow rules are used to support the integration of Oracle CRM On Demand with the Oracle CRM On Demand Disconnected Mobile Sales application. **NOTE:** The Signed or Submitting status triggers a call submission to the Oracle CRM On Demand Disconnected Mobile Sales application if your company administrator has configured the workflow run-time event action for the Activity record. For information on how to configure this run-time event action, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*. For general information about configuring workflow rules, see Workflow Configuration (on page 1490). **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Activity Currency	You can select a different currency to convert the price to another currency, if your company administrator set that feature up.
Objective	Limit of 1,500 characters
Start Time	Date and time the call starts. Defaults to today's date and 12:00 p.m. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Duration	Calculated field (in minutes) based on start time and end time. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
End Time	Defaults to start time plus 30 minutes.

Field	Description
	NOTE: This field is not copied to the new record when you create a new call record from a smart call template.
Type	The can be one of the following: Call, Correspondence, Demonstration, Email, Event, Fax, Meeting, Personal, Presentation, Other, or To Do. To perform samples management, you must choose Call.
Call Type	(Read-only) Displays Account Call, Professional Call, Attendee Call, or General Call depending on the type of call. **NOTE:** The Call Type field defaults to Professional Call for contact calls, Account Call for parent account calls, and Attendee Call when adding attendees to the parent account call.
Ref #	Text field that can be used to store the reference number of a related item such as a signed document. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Additional Information	
Cost	**NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Paper Sign	**NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Private	**NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.
Description	Limit of 16,350 characters.
Next Call	Limit of 1,500 characters. **NOTE:** This field is not copied to the new record when you create a new call record from a smart call template.

Related Topics

See the following topics for related information about tracking visits to customers:

- Dropping Samples During a Sales Call (on page 558)
- Setting the Maximum Number of Times Contacts Can be Sampled (see Setting the Maximum Number of Times Contacts Can be Sampled Without a Valid State License on page 1879)
- Authorizing Contacts to Receive Samples (see Authorizing Contacts to Receive Samples on page 1880)
- Tracking the Best Calling Times (on page 301)

Mass Call Planning

You can create a planned call for one or more customers in the following ways:

- From the Account Detail or Contact Detail page with a status of Planned.

  For more information about creating a planned call for a customer from the Account Detail or Contact Detail page, see Tracking Visits (Sales Calls) to Customers (on page 208).
- From the Account List or Contact List page using the mass call planning feature.

  For more information about creating a planned call for multiple customers from the Account List or Contact List page using the mass call planning feature, see the following procedures.

When the status of your call is set to Planned, the call appears on the calendar and in the Planned Calls section on the Calendar page. The Planned Calls section on the Calendar page lists up to two weeks of planned calls in chronological order for the sales representative and displays the following information for each planned call: call date and start time, time of day, subject, contact to be visited, and other contact address information.

The color coding that is used in the Planned Calls section on the Calendar pages is determined by the theme that you use, as follows:

- Overdue planned calls with a start date that is in the past appear in the color that your administrator selects for the alert text in the theme.
- Upcoming planned calls with a start date that is in the future appear in the color that your administrator selects for the page links in the theme.

NOTE: To see planned calls on the Calendar and the Planned Calls section on the Calendar page, your user role must include the Calls: Calendar Planned Calls privilege.

You can create a planned call for up to 25 customers by using the mass call planning feature in Oracle CRM On Demand. Use the following procedure to create a planned call for multiple contacts.

NOTE: A planned call is created for the first appropriate day within the seven days after the current day. For example, if today is Tuesday, and if you select Wednesday as the day for a planned call, then the call is created for tomorrow. However, if you select Tuesday as the day for a planned call, then the call is created for Tuesday of next week rather than for today, even if the time of day that you select is later than the current time. Also, only one instance of each planned call is created, that is, you cannot set up planned calls to recur at intervals.

To create a planned call for multiple contacts at one time

1. Go to the Contacts Homepage.
2. Select the contact list that you want in the Contact Lists section of the page.
3. On the Contact List page, click Menu, and select Mass Call Planning.
4. On the Planned Calls page, enter the following information for each contact that you want to include in your mass call plan:
   - Enter the day of the week that you plan to call.

     The valid options are: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday.
   - Enter the best time to call.

     The valid options are: Early Morning (7 to 9 am), Morning (9 to 11 am), Mid Day (11 am to 1 pm), Early Afternoon (1 to 3 pm), Afternoon (3 to 5 pm), Early Evening (5 to 7 pm), Late Evening (7 to 9 pm), and Late Night (9 to 11 pm).
5. Click Finish.

   On the Calendar page, all the planned calls are now visible on the Calendar and in the Planned Calls section of the page, provided your user role includes the Calls: Calendar Planned Calls privilege. An information message displays above the Calendar indicating the number of planned calls that were created.
6. Click the appropriate link on the Calendar or the appropriate Subject link in the Planned Calls section of the Calendar page to open the Call Detail page.

   The following field data is filled in automatically for each new call record created through mass call planning:

- The Status field has a value of Planned.
- The Start Date has a value that combines the Day of the Week and Best Time to Call.
- The End Date field has a value equal to the Start Date plus 30 minutes.
- The Subject field has a value of Professional Call plus the Contact Name.
- The Type field has a value of Call.

7 Enter or update the information in the remaining fields on the Call Detail page as required.

For example, to populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.

For more information about the fields on the Call Detail page, see Tracking Visits (Sales Calls) to Customers (on page 208).

8 If required, add line items to the call record, and then click either Save as a Private Smart Call or Save as a Public Smart Call.

You can link product detailed information, samples dropped information, and promotional items to the call record. For more information about adding line items to a call record, see Tracking Visits (Sales Calls) to Customers (on page 208).

Use the following procedure to create a planned call for multiple accounts.

To create a planned call for multiple accounts at one time

1. Go to the Accounts Homepage.
2. Select the account list that you want in the Account Lists section of the page.
3. On the Account List page, click Menu, and select Mass Call Planning.
4. On the Planned Calls page, enter the following information for each account that you want to include in your mass call plan:
   - Enter the day of the week that you plan to call.

     The valid options are: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday.
   - Enter the best time to call.

     The valid options are: Early Morning (7 to 9 am), Morning (9 to 11 am), Mid Day (11 am to 1 pm), Early Afternoon (1 to 3 pm), Afternoon (3 to 5 pm), Early Evening (5 to 7 pm), Late Evening (7 to 9 pm), and Late Night (9 to 11 pm).
5. Click Finish.

   On the Calendar page, all the planned calls are now visible on the Calendar and in the Planned Calls section of the page, provided your user role includes the Calls: Calendar Planned Calls privilege. An information message displays above the Calendar indicating the number of planned calls that were created.
6. Click the appropriate link on the Calendar or the appropriate Subject link in the Planned Calls section of the Calendar page to open the Call Detail page.

   The following field data is filled in automatically for each new call record created through mass call planning:
   - The Status field has a value of Planned.
   - The Start Date has a value that combines the Day of the Week and Best Time to Call.
   - The End Date field has a value equal to the Start Date plus 30 minutes.
   - The Subject field has a value of Account Call plus Account Name.
   - The Type field has a value of Call.
7. Enter or update the information in the remaining fields on the Call Detail page as required.

For example, to populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.

For more information about the fields on the Call Detail page, see Tracking Visits (Sales Calls) to Customers (on page 208).

8 If required, add line items to the call record, and then click either Save as a Private Smart Call or Save as a Public Smart Call.

You can link product detailed information, samples dropped information, and promotional items to the call record. For more information about adding line items to a call record, see Tracking Visits (Sales Calls) to Customers (on page 208).

About Ownership of the Planned Calls

The ownership of a planned call is determined as follows:

- If the Activity record type is configured in user mode, then the user who creates the planned call becomes the owner of the call by default.
- If the Activity record type is configured in mixed mode, then the Owner field on the planned call is blank by default. However, the first time that the call is edited, the user who edits it might be prompted to populate either the Owner field or the Book field for the call, depending on how your administrator sets up these fields.
- If the Activity record type is configured in book mode, then for the call to be created successfully, at least one of the following conditions must be true:
  - A custom book is selected as the default book for the Activity record type on your user record.
  - A custom book is selected as the default book on your user record.

  After you create the planned call, the Owner field and the Book field on the call are both blank. However, the first time that the call is edited, the user who edits it is prompted to populate the Book field, as this is a required field when the Activity record type is configured in book mode.

Related Topics

See the following topics for related information:

- Tracking Visits (Sales Calls) to Customers (on page 208)
- Dropping Samples During a Sales Call (on page 558)

Adjusting Message Responses

A *message response* is feedback received from the audience during the presentation of a messaging plan during a particular period. The feedback is based on mouse clicks or taps of a tablet pen made by the presenter. Such feedback is collected continuously throughout a messaging plan delivery and is tracked by time and the specific messaging plan item being presented. For more information on messaging plans, see Messaging Plans (on page 612).

The message responses that are displayed are collected and populated from the PCD delivery software. The responses that are relevant to past interactions must be displayed in Oracle CRM On Demand. The modification privileges to these responses must be granted only to administrative persons who have authority to retroactively adjust message-plan responses.

Your user role must include the Manage Personalized Content Delivery privilege to work with the Message Response pages.

NOTE: This feature is available in Oracle CRM On Demand Life Sciences Edition only. The Message Response record is available only as a related item of a Call record and is not available as a top-level record type.

To adjust a message response

1 From a Call Detail page, scroll to the Message Responses related item section, and click New.

NOTE: You might need to add the Message Responses section to your Call Detail page. For information about personalizing Detail page layouts, see Changing Your Detail Page Layout (on page 749). If the Message Responses section is not available to add to your page layout, then contact your company administrator.

2 From the Message Response Edit page, view and adjust the following fields, if required.

Field	Description
Key Message Response Information	
Name	The name assigned to the message response record. (Required field.) **NOTE:** By default, the Name field is a read-only field. However, because this field is also a required field, your company administrator must customize the Message Response page layout so that the Name field is editable to be able to save the Message Response record.
Messaging Plan	The messaging plan being shown for a given message response. Click the Selector icon to choose an existing messaging plan.
Sequence	The sequence number of the messaging plan item corresponding to a particular response. (Required field.)
Messaging Plan Item	This field identifies the specific messaging plan item being shown with the messaging plan.
Product	The product associated with the parent messaging plan. Use the Lookup icon to select a product. (Required) **NOTE:** The Product field value must be the same as the parent Messaging Plan record. However, Oracle CRM On Demand does not enforce this requirement. You must ensure this value is the same as the parent Messaging Plan manually. If you do not, then you encounter data integrity issues. For example, if you have the Product field set to AAAA in the Messaging Plan, and if you update the Product field from AAAA to BBBB in any of the child PCD records (Messaging Plan Item, Messaging Plan Item Relations, or a Message Response) by using Web services, then the child PCD record describes product BBBB incorrectly, instead of product AAAA. **NOTE:** This field is not set up by default. If you require this field, then contact your company administrator to set it up, or see Configuration Guide for Oracle CRM On Demand Life Sciences Edition.
Solution	The underlying multimedia or graphic file content which is the subject of the response. Before Release 23, the Solution field was a required field by default. However, for Release 23, this field is no longer required by default. However, if your company has customized the page layout for this record type that occurred before Release 23, then the Solution field remains a required field for those customized layouts. To change this field to Not Required, your company administrator must deselect the Required check box for the Solution field that was set up in the customized page layout for this record type. For more information on field setup, see Creating and Editing Fields (on page 1219).

Field	Description
Response	The preconfigured values for responses are as follows: Continue Discussion, Need Data, Accepted, Not Interested, Rejected, or Not Shown. Select a value from the drop-down list.
Notes	Additional descriptive information about the response.
Section	A component of a presentation item (for example, a graph) that might be activated during a presentation by the presenter. This component is the subject of a given response value.
Start Time	The beginning of the response period when the first message response was received. To adjust, click the calendar icon to select the start date and time.
End Time	The end of the response period when the last message response was received. To adjust, click the calendar icon to select the end date and time.
Duration	The period (in seconds) between the start time and end time.
Followup	The presenter selects this check box during the presentation of a messaging plan to indicate that a follow-up request has been submitted for a particular segment of the messaging plan. A follow-up request can include sending literature, and so on. This field is not selected by default.
Type	The message response category. Use the picklist to select a type. The default values for the Type field are Message Response and Outcome. Selecting a type can result in a different page layout from the default page layout for message responses if your administrator has set up dynamic page layouts for this record type. For example, selecting Outcome can result in a Message Outcome page layout, if it was set up by your administrator. For more information on setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts (on page 1314) and also see the topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*. **NOTE:** This field is not set up by default. If you require this field, then contact your company administrator to set it up, or see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
NOTE: The Start Time, End Time, Followup, and Response fields were required fields in releases earlier than Release 24. In Release 24, these fields are no longer required fields.	

3 Save the record if you have adjusted any of the fields.

Scheduling Appointments with Others

When you want to schedule an appointment and notify others of the appointment, follow this sequence:

1 Create an appointment.

2 Invite contacts and users.

When scheduling appointments with others, the application distinguishes between:

- **Contacts.** Customers, partners, and so on who are listed in your company information as contact records.
- **Users.** Oracle CRM On Demand users at your company.

3 Check the users' availability

You can view availability of users, but not contacts, since you do not have access to calendars that reside outside of the application.

NOTE: To perform this step, your user role must include the Share Calendar privilege.

4 Send notification of the appointment to all invitees.

To add invitees to the appointment

1 Create the appointment; fill in the appointment information, and save the record.

2 On the Appointment Detail page, scroll down to the Contacts section and click Add.

NOTE: You might have to add the Contact and User sections to your layout. For information about personalizing Detail page layouts, see Changing Your Detail Page Layout (on page 749).

3 In the Lookup window, select an existing contact, or click New and create the contact record.

The selected contacts appear in alphabetical order.

4 Click OK.

NOTE: To change which contact appears as the Primary Contact, click the Edit link beside the appointment on the Calendar page. On the Appointment Edit page, click the Lookup icon beside the Primary Contact field, select the new primary contact, and click Save. The primary contact appears in the Calendar summary. The new primary contact is also added to the Contacts section of the Appointment Detail page, if it was not already there.

5 On the Appointment Detail page, scroll down to the Users section and click Add.

NOTE: When you add a user to an activity team, you cannot specify the access profile for the user for the activity record. The user is automatically given the ReadOnly access profile for the activity. The user whose name appears in the Delegated By field on an activity is automatically given the Full access profile for the activity. The access level that the user has to the record depends on how the access profile is configured. However, regardless of how the ReadOnly access profile is configured, only the activity owner and the user whose name appears in the Delegated By field on an activity can remove users from that activity.

6 In the Lookup window, select the users you want to invite to the appointment.

The list that appears in the Lookup window contains all Oracle CRM On Demand users at your company.

7 Click Save.

To check the users' availability

1 On the Appointment Detail page, click User Availability.

For the User Availability button to appear, your user role must include the Share Calendar privilege.

A combined calendar appears showing the list of users and their calendars. Rows for users who have not shared their calendar with you appear as blank bars.

To view information about busy time shown on the calendar, hover over the appointment with your mouse.

2 To view the availability on another day, you can:

- Click the arrows in the calendar header to scroll to the next or previous day
- Click the calendar icon in the calendar header

3 Update the appointment date and time, if necessary.

4 Save the record.

CAUTION: No warning message appears if you create an overlapping appointment.

To send an email notification to the invitees (contacts and users)

1. On the Appointment Detail page, click Send Email.
2. An email opens with this information:
   - **To.** Invitees (contacts and users)

     If your list exceeds 70 invitees, the email is sent to the remaining invitees, but their email addresses do not appear in the To line.
   - **Subject.** The Subject line in the email includes the word *Appointment* followed by the values of the Subject, Location, Start Time, and End Time fields from the appointment. You can edit the content of the Subject line in such emails. However, if the character set for your user language uses multibyte characters, then you must enable support for Unicode (UTF-8) in your email client. For information about enabling support for Unicode (UTF-8) in an email client, see the help documentation for the email client.

Related Topics

See the following topics for related information:

- Activity Fields (on page 229)
- Setting Your Default Calendar View (on page 224)
- About Activity Reminders (on page 200)

Saving Appointments as iCalendar Files

This topic describes how to save appointments as iCalendar files. It applies only to calls and appointments.

Oracle CRM On Demand enables you to save appointments in the iCalendar file format. This functionality enables you to store the details of your appointments so that you can transfer them to other computers or devices, such as mobile devices, and then open them in applications that support the iCalendar format.

Attachments

When you save an appointment as an iCalendar file, Oracle CRM On Demand tries to include all of the appointment's attachments in the iCalendar file. However, the maximum allowed size for an iCalendar file that is saved from Oracle CRM On Demand is 500 megabytes (MB). Depending on the size of the attachments, some of the attachments might not be included in the iCalendar file. Oracle CRM On Demand selects the attachments to be added to the iCalendar file as follows:

- Oracle CRM On Demand sorts and adds the attachments, including both the file and URL attachments, in ascending alphabetical order. The order is based on the Attachment Name field.
- Before adding an attachment to the iCalendar file, Oracle CRM On Demand calculates whether the attachment will cause the iCalendar file to exceed the maximum allowed size. If the attachment will not cause the iCalendar file to exceed the maximum allowed size, then the attachment is added to the file. If the attachment will cause the iCalendar file to exceed the maximum allowed size, then Oracle CRM On Demand skips that attachment and continues to the next attachment in the list.

TIP: Consider renaming your attachments so that the most important attachments appear at the start of the list of attachments when the list is sorted in ascending alphabetical order on the Attachment Name field.

The following procedure describes how to save an appointment as an iCalendar file.

To save an appointment as an iCalendar file

- Do one of the following:

- In the daily, weekly, or monthly calendar view, click the Save as iCalendar link for the appointment that you want to save.
- In an Appointment Detail page or a Call Detail page, click Save as iCalendar.

Depending on your browser settings, you might be asked to specify the location where you want to save the iCalendar file. The iCalendar file is saved with the .ics file extension by default.

Related Topic

See the following topic for related information:

- About the Information in iCalendar Files (on page 221)

About the Information in iCalendar Files

This topic describes the information that Oracle CRM On Demand writes to iCalendar files. It applies only to calls and appointments.

When you save an appointment as an iCalendar file, information from Oracle CRM On Demand is written to certain properties in the iCalendar file. The information that is written to the iCalendar file includes information from the appointment, as well as information from the users, contacts and attachments that are linked to the appointment. The following table shows the information that is written from Oracle CRM On Demand to the iCalendar properties.

iCalendar Property	Oracle CRM On Demand Fields	Description
ORGANIZER	Owner	The full name of the user who is the owner of the appointment. **NOTE:** If the appointment has no contacts or users linked to it other than the user who owns the appointment, then the ORGANIZER property is not included in the iCalendar file.
ATTENDEE	Name and Email	■ Each user that is linked to the appointment in Oracle CRM On Demand is added as an attendee in the iCalendar file. The full name and email address of the user are written to the iCalendar file. ■ Each contact that is linked to the appointment in Oracle CRM On Demand is added as an attendee in the iCalendar file. The full name and email address of the contact are written to the iCalendar file.
SUMMARY	Subject	The content of the Subject field of the appointment.
LOCATION	Location	The content of the Location field of the appointment.
DTSTART	Start Time	The start date and time of the appointment. An appointment that starts at 12:00 A.M. on a certain day and ends at 12:00 A.M. on the following day is considered an all-day appointment. For such all-day appointments, VALUE=DATE is written to the iCalendar file.

iCalendar Property	Oracle CRM On Demand Fields	Description
DTEND	End Time	The end date and time of the appointment. An appointment that starts at 12:00 A.M. on a certain day and ends at 12:00 A.M. on the following day is considered an all-day appointment. For such all-day appointments, VALUE=DATE is written to the iCalendar file.
DESCRIPTIONS	Description	The content of the Description field on the appointment.
UID	Row Id	The row ID of the appointment record.
CREATED	Created: Date External	The date and time when the appointment was created.
LAST-MODIFIED	Modified: Date External	The date and time when the appointment was last updated.
ATTACH	File and attachment content, or Attachment Name and URL	For a file attachment, the file name and the content of the file are included in the iCalendar file. The content of the file is encoded using Base64 encoding. For a URL attachment, the attachment name is included as a file name with the .txt file extension. The URL is included as the content of the text file and is encoded using Base64 encoding.

Related Topic

See the following topic for related information:

- Saving Appointments as iCalendar Files (on page 220)

Viewing the Calendars of Other Users

Before you begin. To perform this procedure, your user role must include the Share Calendar privilege.

You can view:

- Another user's calendar

  You can view the individual calendars of users in your group (if you are a member of a group) and the calendars of other users who explicitly share their calendar with you.

  NOTE: You cannot view the calendars of the users who report to you unless those users are members of a predefined group of which you are also a member, or the users explicitly share their calendar with you.

- A group calendar (if you are a member of a group) that combines the calendars of all the members of your group into a single calendar view

  NOTE: The list shows the users in alphabetical order. If the list exceeds ten users, scroll through the list to view the additional users' calendars.

  For more information about groups, see Group Management (on page 1458).

- Custom views that combine other users' calendars

  For example, you might be working on a special short-term project with a number of users in different functions. Setting up a custom view that includes calendars for only those users allows you to see the schedule for those users in a single view. When you set up a custom calendar view, you can add the following users to the view:

- Users who are members of your group (if you are a member of a group)
- Users who explicitly share their calendar with you

For more information on setting up custom calendar views, see Adding Custom Calendar Views (on page 226).

NOTE: Only invitees and owners of appointments can view the details for private appointments.

To view another user's calendar

1. On the Calendar page, click the User tab, if necessary.
2. In the title bar, click the Lookup icon and click the Last Name of the user in the Lookup window.

   That user's calendar populates the User view.

   NOTE: Only users who share their calendars with you, and users who are members of your group, are available to select.

To quickly return to your own calendar

- Click the My Calendar button in the title bar.

To view a combined calendar for all group members

1. On the Calendar page, click the Group tab.
2. On the combined calendar, you can:
   - Click the user's name to go to the user's personal calendar.
   - Click the appropriate icon to view the combined calendar for a single day, or a week, or a month.

In the group calendar and in custom calendar views:

- Two different background colors are used, with one color for each of the following:
  - The business hours on work days.
  - The non-working hours, including all of the hours on days that are not work days, as well as the hours outside of business hours on work days.
- If you do not have access to the calendar of a user who is included in a custom calendar view, then the schedule for that user is grayed out in the custom calendar view unless the user explicitly shares his calendar with you. For example, if a user who was included in a custom calendar view stops sharing his calendar with you, or if a user who was included in a custom calendar view or your predefined group becomes inactive, then that user's schedule is grayed out.

  NOTE: After a user is added to your predefined group, the user is included in your group calendar view, but the schedule for the user is grayed out until the next time you sign out of Oracle CRM On Demand and sign in again.

- You can switch between viewing the full day and viewing only the business hours.
- If you choose to view only the business hours in the daily view, and if there are any appointment that start before your business hours or end after your business hours, then the hours that are displayed are extended to show those appointments.
- The duration of an appointment is rounded up to the nearest 15 minute slot for display purposes. For example, an appointment of between 1 minute and 15 minutes duration displays as an appointment of 15 minutes duration, and an appointment of between 31 minutes and 45 minutes duration displays as an appointment of 45 minutes duration.

Related Topics

See the following topic for related information about custom calendar views:

- Adding Custom Calendar Views (on page 226)

Calendar Settings Page

Click a topic to see instructions for doing the following from the Calendar Settings page:

- Sharing Your Calendar (on page 224)
- Setting Your Default Calendar View (on page 224)
- Adding Custom Calendar Views (on page 226)

NOTE: The calendar functions only according to the Gregorian calendar. It cannot be configured for other calendar systems.

Sharing Your Calendar

Before you begin. To perform this procedure, your user role must include the Share Calendar privilege.

To extend access to your calendar beyond your group members, you need to explicitly share the calendar to the other user.

To share your calendar

1. On the Calendar pages, click Calendar Setup.
2. On the Calendar Settings page, click Share Calendar.

   If you are a member of a group, the members of your group are listed in the Default Sharing section.
3. In the My Calendar Share List section, click Add Users.
4. On the Shared Calendar page, select the users with whom you want to share your calendar.
5. Save your changes.

Setting Your Default Calendar View

This topic describes how to set up your default calendar view from the Calendar Setup link in the calendar pages.

When setting up your default calendar view, you can do the following:

- Select the calendar view that you want to display each time that you click the Calendar tab.
- Select the activity list that is to be displayed in the daily and weekly views of your own calendar and the individual calendars of other users who share their calendar with you (the daily and weekly user calendar views).

  In the standard application, the Open Tasks list is displayed, but you can select a different list in the Activity List on User Calendar View field in your calendar settings. Your administrator can also select a list for your user role. If you leave the Activity List on User Calendar View field blank, then the setting for your role is used, and if the Activity List on User Calendar View field on your user role is blank, then the Open Tasks list is displayed.

  All of the lists that are available to you, including private lists, public lists, system lists, and lists that are specific to your user role for the activity record type, are available for selection. In the daily and weekly user calendar views, only three of the columns from the list are shown, as follows:

  - The Subject column is always shown, provided that the Subject field is selected as a display field in the list definition.
  - The first two columns in the list, other than the Subject column, are shown.

If the list that you select is later deleted or becomes unavailable to you, then the list that is displayed in the daily and weekly user calendar views is determined as follows:

- If a list is selected in the Activity List on User Calendar View field on your user role, then that list is displayed.
- If the Activity List on User Calendar View field on your user role is blank, then the Open Tasks list is displayed.

- Specify which day is shown as the first day of the week in your calendar and in the date selectors where you select values for date fields in Oracle CRM On Demand.
- Select the days of the week and the business hours that you want to show in your calendar, if you do not want to use the company-wide settings.

  By default, all of the check boxes for the days of the week are deselected, and the Business Hours Start Time and Business Hours End Time fields are blank. When specifying business hours, you can enter only one start time and one end time. You cannot specify different business hours for individual work days. If you enter a start time for your business hours, then you must also enter an end time, and the end time must be later than the start time. Similarly, if you enter an end time, then you must also enter a start time. If necessary, Oracle CRM On Demand converts the start time and end time that you enter to the appropriate format for your locale after you save your changes.

  In the daily and weekly views of your own calendar and the individual calendars of other users who share their calendar with you, the start and end times for business hours can be shown on the hour if you use a classic theme, and on the hour or half-hour if you use a modern calendar. In the group calendar and custom calendar views, the start and end times for business hours can be shown on the hour. Oracle CRM On Demand rounds the start time for the business hours down to the nearest hour or half-hour as appropriate, and rounds the end time for the business hours up to the nearest hour or half-hour. For example, if you enter 08:40 A.M. as your start time, then Oracle CRM On Demand rounds the start time down to 08:00 A.M. for the daily and weekly views of individual calendars if you use a classic theme, and rounds it down to 08:30 A.M. if you use a modern theme. If you enter 5:40 P.M. as your end time, then Oracle CRM On Demand rounds the end time up to 06:00 P.M. for the daily and weekly views of individual calendars in either a classic theme or a modern theme.

  For more information about how the work days and business hours are shown in your calendar views, see About Calendar Work Days and Business Hours (on page 193).

- Select additional information to display in the appointments in your calendar views. By default, the information from the Subject, Location, and Contact Name fields in the appointment is shown in the appointments in the calendar views. You can choose to display the following additional information:
  - The name of the account that is linked to the appointment. The account name is a link to the account record.
  - The status of the appointment.
  - The phone number of the primary contact that is linked to the appointment. The phone number is a link to the contact record. If the Work Phone field is populated on the contact record, then the work phone number is shown. If the Work Phone field is not populated on the contact record, and if the Cellular Phone field is populated, then the cellular phone number is shown.
- Specify whether you want to receive reminders for activities that you own or on which you are included in the list of users, if reminders are configured on the activities. The options in the Activity Notification field are as follows:
  - **None.** If you select this option, then you do not receive any reminders.
  - **Email.** If you select this option, then you receive the email reminders.
  - **Pop-up Reminder.** If you select this option, then the reminders are displayed in the Activity Reminder pop-up window when you are signed in to Oracle CRM On Demand.
  - **Email and Pop-up Reminder.** If you select this option, then you receive the email reminders and the reminders are also displayed in the Activity Reminder pop-up window when you are signed in to Oracle CRM On Demand.

- **Blank.** If you leave the Activity Notification field blank, then the option that is selected in the Activity Notification field at company level applies to you. The default option at company level is None, but your administrator can select a different option.

The following procedure describes how to set your default calendar view.

To set your default calendar view

1 On the Calendar pages, click Calendar Setup.
2 On the Calendar Settings page, click Default Calendar View.
3 On the Default Calendar Settings page, specify your preferences as follows:
   a Select a calendar view.
   b (Optional) Select the activity list that is to be displayed in the daily and weekly user calendar views.
   c Select the day that is to be shown as the first day of the week in your calendar.

   By default, the Calendar Week Starts On field is blank. If you leave this field blank, then the company-wide setting for the first day of the week is used.

   NOTE: After you change the start day of the week, you must sign out of Oracle CRM On Demand and then sign in again to see the change in your calendar and in the date selectors where you select values for date fields in Oracle CRM On Demand.

   d In the Calendar Work Week section, set up the work days and the business hours for your calendar, as follows:

   - Select the check box for each day that you want to show as a work day in your calendar. If you select the check box for one or more days, then only those days are shown as work days in your daily and weekly user calendar views, regardless of the work days that are specified at company level. If the check boxes for all days are deselected, then the work days that are specified at company level apply to your calendar.
   - If you want to specify a start time for your business hours that is different from the time specified at company level, then enter the start time in the Business Hours Start Time field.
   - If you specified a start time for your business hours, then enter the end time in the Business Hours End Time field. The end time must be later than the start time.

   NOTE: If you do not enter a start time and an end time for the business hours, then the business hours that are specified at company level apply to your calendar.

   e In the Appointment Information Preferences section, select the check boxes for the additional information that you want to display in the appointments in your calendar views.
   f In the Activity Notification field, select the option that you want, or leave the field blank if you want the setting at company level to apply to you.
   g Save your changes.

Adding Custom Calendar Views

Before you begin. To perform this procedure, your user role must include the Share Calendar privilege.

If you are a member of a group (and your role has the Share Calendar privilege), you can automatically view a merged calendar that combines the calendars of all the members in your group into a single calendar view. However, you might want to set up different, combined calendar views to meet your specific needs. To set up combined calendar views, add a custom view.

For example, you might be working on a special short-term project with a number of users across functions. Setting up a custom view that includes calendars for only those users allows you to see the schedule for those users in a single view. When setting up a custom calendar view, you can add the following users to the view:

- Users who are members of your group (if you are a member of a group)
- Users who explicitly share their calendar with you

NOTE: Custom views do not allow you to change the starting day for the week or the starting time for the day.

To add a custom calendar view

1 On the Calendar pages, click the Calendar Setup link.
2 On the Calendar Settings page, click Manage Group Views.
On the Manage Views page, your group name appears in the Standard Views section.
3 Click Add.
4 On the Manage View page, enter a name and description of the view.

NOTE: You cannot select an entire group to share calendars with; instead, you need to add each member of that group as a user to a custom view.

5 Save the record.
6 On the Manage Views page, click the Name of the new group.
The Manage View Detail page appears.
7 Click Add Members, and select the users.
8 Save the record.
On the Calendar Group tab, your new view appears in the drop-down list.

Viewing Group Task Lists

If your company uses the group assignment option, and if you are a member of a group, then you can view a consolidated list of the tasks that are owned by a member of your group or have a member of your group on the activity team. For more information about groups, see Group Management (on page 1458).

To view the group tasks lists

1 On the Calendar page, click the Group Tasks tab.
2 From the drop-down list, select the list of tasks you want to view.

NOTE: Tasks that other users have marked as private are not shown in the group task list.

Using Activity Assessment Scripts

Your company administrator might have set up assessment scripts to help you to gather information about and evaluate activities, such as tasks, appointments, and sales calls. An *assessment script* consists of a series of questions that you use to collect customer data. Your responses are scored, assigned a weight, and compared with a specified threshold to determine the appropriate outcome or course of action.

NOTE: Smart Calls do not have Activity Assessments enabled at this time.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see About Assessment Scripts (on page 1865).

To use an activity assessment script

1 Select the activity.
For more information about selecting activities, see Finding Records (on page 74). For more information about activities, see Calendar and Activities (on page 189).

2 On the Detail page (Call, Appointment, or Task Detail page) for the activity, scroll down to the Activity Assessment section, and click Add.

NOTE: You might need to add the Activity Assessment section to your page layout. For information about personalizing Detail page layouts, see Changing Your Detail Page Layout (on page 749).

3 In the Lookup window, search for the appropriate script, and click Select. You can use the filter fields at the top of the Lookup window to filter the list of scripts.

4 On the Activity Assessments page, select the answer for each script question, and click Save.

The Detail page (Call, Appointment, or Task Detail page) for the activity appears again.

Depending on the outcome of the script, some of the fields on the record might have been updated automatically.

About Event and Appointment Synchronization

If your company administrator selects the Display Events in Calendar setting in the Company Profile page, then Oracle CRM On Demand displays the details of event records in the calendar. If the setting is selected, then Oracle CRM On Demand automatically maintains an associated appointment record for an event record. When a user creates, updates, or deletes an event record through the UI, the Import Assistant, or Web services, Oracle CRM On Demand creates, updates or deletes the associated appointment record. Conversely, Oracle CRM On Demand automatically updates or deletes the original event record whenever you update or delete the corresponding appointment record for the event through the same channels.

For example, consider an event named Cardiologist's Conference that is scheduled to take place from 7/20/2015 09:00 A.M. to 7/20/2015 05:00 P.M. at the Marriott Hotel. Oracle CRM On Demand creates an appointment record as follows:

- Sets the subject to Cardiologist's Conference
- Sets the appointment time and dates to begin at 09:00 AM on 7/20/2015 and end at 05:00 PM on 7/20/2015
- Sets the location to Marriot Hotel
- Sets the activity type to Event

Oracle CRM On Demand displays the appointment for the event in the Oracle CRM On Demand calendar. Moreover, calendars for other products that are synchronized with Oracle CRM On Demand such as Oracle CRM On Demand Desktop also display the appointment.

The following table shows the mapping of fields between an event record and its corresponding appointment record.

Event Record Field	Appointment Record Field
Name	Subject
Start Time	Start Time
End Time	End Time
Location	Location
Owner	Owner
Book	Book

When a user creates an event, Oracle CRM On Demand creates the corresponding appointment and copies these fields from the event to the appointment. In addition, Oracle CRM On Demand copies certain child records for an event such as, a user added to an event team, or a book that is added to an event. Similarly, Oracle CRM On Demand creates these child records for events when they are created on an appointment record. In the calendar entry that Oracle CRM On Demand creates for an event, it displays the name and location of the event as the subject and location of the appointment, with the location in parentheses. Clicking on the Subject link, takes you to the Appointment Detail page, as with any non-event calendar entry.

NOTE: For pre-existing event records, whenever the user updates an event and saves it, Oracle CRM On Demand automatically creates the appointment, along with the book and user child records, from that point in time. That is, Oracle CRM On Demand does not display old events in the calendar until the user updates and saves the event again. Adding or removing any child records of an event is not considered as an update to the event record, and does not trigger the creation of an appointment. In addition, if your company administrator deselects the Display Events in Calendar setting in the company profile, then Oracle CRM On Demand no longer creates an associated event appointment corresponding to any new events. However, any existing event appointments created since the time your administrator selected the setting remains in Oracle CRM On Demand, and Oracle CRM On Demand continues to synchronize those event appointments with the corresponding event updates to avoid data discrepancy between the event and the event appointment. However, Oracle CRM On Demand does not display the event appointment in the calendar because the administrator has deselected the setting.

When a user deletes a mapped event appointment, or the original event, Oracle CRM On Demand deletes both the mapped event appointment and the event itself, including the shared child records such as a shared user record, or a shared book record. Users can recover either record from the Deleted Items page for up to 30 days after deletion. Restoring one of these records restores the other corresponding record. For example, restoring an event restores the corresponding appointment for that event.

Users who are added to a synchronized appointment as a user are added to the event as a team member with read-only record access to the event, and users added to a synchronized event have read-only record access to the appointment. Oracle CRM On Demand evaluates the union of record access from the team and the default access profile attached to the user’s role to determine the user’s access to the record. User group members do not get added to an event as team members. Regardless of the channel from where a user gets added as an event team member, that user gets added to the appointment as a user.

Users who can access a synchronized appointment through a book have the same access to the event through the book, and if they can access a synchronized event through a book, then they have the same access to the appointment through the book. The event appointment is not displayed in the calendar of a user who gets access through a book, however the user gets access to the event appointment record in lists of appointments. If there is a workflow on an event with a Book Assign action, then the book that is assigned to the event is also assigned to the synchronized appointment. The reverse is also true, that is, if there is a workflow on an activity with a Book Assign action, then the book that is assigned to the appointment is also assigned to the synchronized event.

Related Topics

See the following topics for related information:

- Managing Calendars and Activities (on page 196)
- Managing Events (on page 526)
- Deleting and Restoring Records (on page 173)

Activity Fields

Use the Task Edit page to add a task or update details for an existing task. Use the Appointment Edit page to add an appointment or update details for an existing appointment. Use the Call Edit page to update the details of an existing planned call. The Edit pages show the complete set of fields for a task or appointment.

TIP: You can also edit the activities on the Activities List page and on the Appointment, Task, and Call Detail pages. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields available on the Task and Appointment Edit page. For more information about the fields available on the Call Edit page, see Tracking Visits (Sales Calls) to Customers (on page 208).

NOTE: If the Activity record type is configured in mixed mode or book mode, then the Delegated Flag field must not be present on the appointment, task, and call detail page layouts, otherwise an error occurs when you try to save the appointment, task, or call.

Field	Description
Account	Account linked to this activity.
Appointment Reminder	The length of time before the appointment start time that reminders about the appointment are to be sent. Reminders are sent to the appointment owner and to each user in the list of users on the appointment, if the Activity Notification field settings at user level or at company level allow activity reminders to be sent to the user. For information about the Activity Notification field, see Setting Your Default Calendar View (on page 224). For information about the format and content of the reminders that are sent to users, see About Activity Reminders (on page 200). If you leave the Appointment Reminder field blank, then no reminders are sent for the appointment. **NOTE:** If you change the specified length of time for the reminder for an existing appointment, then the change applies to the reminder for all users on the appointment. The Appointment Reminder field does not appear on the Appointment Detail page by default in the standard application, but your administrator can add the field to the page layout for your role.
Approval Status	The approval status of the record when the task is created. This field does not appear by default. Company administrators can add this field to the Activity page layout. Company administrators can use this field to assist in tracking record approvals for Partner Relationship Management. This field can be populated as part of a workflow. For more information on the Create Task workflow, see Creating Workflow Actions: Create Task (on page 1534). For more information on configuring Partner Relationship Management, see Oracle CRM On Demand for Partner Relationship Management Configuration Guide.
Call Result	The result for the activity type Birthday Call, Referral Call, or Review Call, such as No Reach, Appointment, Stay in Touch, or Dead File. When you enter a value in this field it becomes read-only.
Campaign	The campaign that is linked to this activity.
Comments	This field contains comments about the activity. It has a limit of 250 characters.

Field	Description
Completed Date	The date and time when the activity was completed. For tasks, this field is automatically populated when the Status field is set to Completed or the Mark as Completed button is clicked. For appointments, if the Completed Date is left blank, it is automatically set to the same value as the End Time field when the appointment is created and saved. If the Completed Date field is not configured as a read-only field, then you can enter a date in this field that is different from the end date for the appointment. However, if you later change the value in the End Time field, then the value in the Completed Date field is also automatically changed to the new value in the End Time field. Also, changing the date in the Completed Date field does not result in the Completed check box for the appointment being selected, or the Status field being set to Completed, even if the new date is in the past. The Completed Date field can never be left blank on appointments because Oracle CRM On Demand uses this field to determine which appointments to include in the Open Activities and Open Appointments lists that appear in several areas in Oracle CRM On Demand. If you clear the value from the Completed Date field on an appointment, then Oracle CRM On Demand automatically resets the field to the same value as the End Time field.
Completed	For tasks, this check box is automatically selected when the Status field on the task is set to Completed. For appointments, this check box is not selected automatically when the Status field on the appointment is set to Completed.
Primary Contact	Primary contact linked to this activity. For companies using the Group feature, this contact is the Primary Contact on the Calendar views.
Delegated By	The user who delegated the activity to another owner. If the Delegated By field is blank when you assign the activity to another owner, then your name automatically appears in the Delegated By field after the activity is reassigned. However, if the Delegated By field is already populated with the name of a user, then the field is not automatically updated when you reassign the activity. If necessary, you can manually update the field so that it shows your name or the name of any other user. Changes to the Delegated By field are not audited by default.
Description	Additional information about this activity. Limit of 16,350 characters.
Due Date	Date this task is due (applies only to tasks).
End Time	The date and time the appointment concludes (applies only to appointments). Defaults to today’s date and 1:00 p.m. Oracle CRM On Demand automatically updates this field, using the start time and duration of the appointment. If you leave the Completed Date field on an appointment blank, then the Completed Date is automatically populated with the value from the End Time field. If you change the value in the End Time field, then the value in the Completed Date field is also automatically changed to the new value in the End Time field.
Lead	Lead linked to this activity.

Field	Description
Location	Place where the appointment takes place (applies only to appointments).
Opportunity	Opportunity linked to this activity.
Owner	The owner of the activity record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Priority	The priority level, such as 1-High, 2-Medium, or 3-Low. The priority level applies only to tasks. The default value is 3-Low. If the Priority field is not a required field for tasks in your company, then you can create a task with a null value in the Priority field. However, if the Priority field is set to a non-null value when a task is created or updated, then you cannot later change the Priority field for that task to a null value, even if the Priority field is not a required field. **NOTE:** If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values (on page 1254).
Private	If the Private check box is selected, then the activity record is not visible by default to other users, even if the activity is linked to a record that is visible to others. However, the activity record might be visible to some users. Users who have the View Private Activities privilege and the Can Read All Records setting for the Activity record type enabled in their user role have visibility to all activities that are marked private, regardless of the owner of the activity. The View Private Activities privilege does not allow a user to update or delete an activity that is marked private and is owned by another user. Users who have the Delete Any Activity privilege and the Can Read All Records setting for the Activity record type enabled in their role can delete activities that they do not own or activities that are marked private. Typically, the Delete Any Activity and View Private Activities privileges are given to company administrators only.
Reject Reason	Indicates why an item was returned or rejected. This field does not appear by default. Company administrators can add this field to Activity page layout. Company administrators can use this field to assist in tracking record approvals for Partner Relationship Management. This field can be populated as part of a workflow. For more information on the Create Task workflow, see Creating Workflow Actions:

Field	Description
	Create Task (on page 1534). For more information on configuring Partner Relationship Management, see Oracle CRM On Demand for Partner Relationship Management Configuration Guide.
Service Request	Service request linked to this activity.
Start Time	Date and time the appointment starts (applies only to appointments). Defaults to today's date and 12:00 p.m.
Status	The status of the task or appointment, for example, Completed, Deferred, In Progress, Waiting For Someone Else, or Not Started. **NOTE:** Administrators can edit the Status picklist and add new values or update the existing values, if their role includes the *Customize Application - Edit Activity 'Status' Picklist* and *Customize Application* privileges. For information on customizing picklist values, see Changing Picklist Values (on page 1254). **CAUTION:** Adding or editing the values that are available by default in the picklist for the Status field for the Activity record type might produce unwanted results for activity processing. Oracle CRM On Demand specifically looks for the Completed, Submitting, Submitted, or Planned field values when it processes activities. If your company deactivates these status values and replaces them with custom values, then the activity processing in the Oracle CRM On Demand application will not work as documented. Consequently, changing the Status field picklist values for the Activity record type is not recommended.
Subject	Title or short description of this activity.
Sub Type	The object type of the approval. This field does not appear by default. Company administrators can add this field to Activity page layout. Company administrators can use this field to assist in tracking record approvals for Partner Relationship Management. This field can be populated as part of a workflow. For more information on the Create Task workflow, see Creating Workflow Actions: Create Task (on page 1534). For more information on configuring Partner Relationship Management, see Oracle CRM On Demand for Partner Relationship Management Configuration Guide.
Task Reminder	The date and time at which reminders about the task are to be sent. Reminders are sent to the task owner and to each user in the list of users on the task, if the Activity Notification field settings at user level or at company level allow activity reminders to be sent to the user. For information about the Activity Notification field, see Setting Your Default Calendar View (on page 224). For information about the format and content of the reminders that are sent to users, see About Activity Reminders (on page 200). If you leave the Task Reminder field blank, then no reminders are sent for the task. **NOTE:** If you change the date or time for the reminder for an existing task, then the change applies to the reminder for all users on the task. The Task Reminder field does not appear on the Task Detail page by default in the standard application, but your administrator can add the field to the page layout for your role.

Field	Description
	NOTE: If you change the due date for a task, the Task Reminder field is not updated automatically. If you want to change the date and time for the task reminder, then you must update this field manually.
Type	For both tasks and appointments, this field refers to a category, such as Approval, Birthday Call, Call, Correspondence, Demonstration, Email, Event, Fax, Lunch, Meeting, Personal, Presentation, Other, Referral Call, Review Call, or To Do.
Activity	This read-only picklist field refers to the type of activity, namely Task, Appointment, Automated Task, COD Activity, or Smart Call. **NOTE:** This field does not appear on default Activity page layouts, such as Task page layouts, or Appointment page layouts, and so on.

3 Marketing

Oracle CRM On Demand provides the following record types for marketing information:

- **Campaigns**. Use these pages to manage marketing campaigns and to generate qualified leads and opportunities.
- **Leads**. Use these pages to track leads for new sales opportunities and to automate the lead conversion process.

Managing Marketing

To manage marketing, perform the following processes.

1. Process of Handling Campaigns (on page 235).
2. Process of Handling Leads (on page 235).

Process of Handling Campaigns

To handle campaigns, perform the following tasks:

1. Create a campaign record, see Creating Records (on page 51) and Campaign Fields (on page 240).
2. Assign campaign recipients, see Targeting Contacts for Campaigns (on page 239).
3. Execute the campaign.
4. Track campaign responses, see Recording Responses to Campaigns (on page 239).
5. Measure campaign effectiveness, see Measuring Campaign Effectiveness (on page 240).
6. Associate leads with the campaign. If the campaign generates leads, you must associate the new leads with the campaign from which they came, see Creating Records (on page 51) and Leads Fields (on page 258).

Process of Handling Leads

To handle leads, perform the following tasks:

1. Set up lead assignment rules, see About Assignment Rules (on page 1562) and Setting Up Assignment Rules (on page 1566).
2. Set up lead conversion rules, see Leads (on page 242) and Mapping Additional Fields During Lead Conversion (on page 1571).
3. Set up lead conversion layouts, see Creating Lead Conversion Layouts (on page 1572).
4. Create lead qualification scripts, see Using Lead Qualification Scripts (on page 251).
5. Qualify the lead, see Qualifying Leads (on page 251).
6. Convert or reject the lead.

   You can convert leads to account, contact, deal registration, or opportunity records, see Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 252). If you decide that a lead is not valuable, you can remove it from the lead management process, see Rejecting Leads (on page 257).

Campaigns

Use the Campaign pages to create, update, and track campaigns. A *campaign* is the vehicle or project in which you convey a marketing message to one or more groups of people, including existing and potential customers. Typically, campaigns deliver a promotional offer to different channels of communication to retain current customers or to acquire new customers. The goal is to generate additional interest in company products and services.

Using campaigns enables you to do the following:

- Store campaign information such as budgeted costs compared with actual costs, targeted leads, and marketing material (for example, brochures and artwork) in one place.
- Share views of campaigns with the marketing team and share consistent campaign information with your sales team from the same location in real time.
- See your campaign results by viewing leads and opportunities, which are generated for each campaign.
- Use prebuilt reports to measure the results and determine the return on investment of your campaign activities in real time.
- Make historical comparisons between current and past campaigns to identify trends.

Sales and marketing managers can import leads and link them to an existing campaign. Lead information must first be formatted in a comma-separated value (.csv) file.

Campaigns, Leads, Opportunities, and Contacts

During a campaign, you can generate multiple leads that are linked to the campaign. If you convert some of those leads to new opportunities, contacts, or accounts, the link to the campaign is carried over from the originating leads to the converted opportunities, contacts, and accounts. For example, Campaign A creates 100 leads, L1 through L100. You link each of these leads to Campaign A. Leads L1 through L90 never show potential for producing revenue. Leads L91 through L100 do show revenue potential, so you convert them to opportunities O1 through O10. Each of these opportunities is automatically linked to Campaign A by way of its originating lead. Several months later, you want to review the effectiveness of Campaign A. You view the Campaign A record and see that there are 100 leads and 10 opportunities linked to it. You can compare these results to past campaigns or to your expectations for this campaign, and make adjustments accordingly.

NOTE: If your company administrator adds custom fields for leads, those fields are not carried over to the opportunity records when the lead is converted to an opportunity or contact. An exception occurs if your company administrator sets up additional mapping through the Lead Conversion Mapping feature. For more information about mapping lead fields, see Mapping Additional Fields During Lead Conversion (on page 1571).

Working with the Campaign Homepage

The Campaign Homepage is the starting point for managing campaigns.

NOTE: Your company administrator can customize the layout of your Campaign Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Campaign

You can create a campaign by clicking the New button in the My Recently Viewed Campaigns section. For more information, see Creating Records (on page 51) and Campaign Fields (on page 240).

Working with Campaign Lists

The Campaign Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for campaigns.

Campaign List	Filter
All Active Campaigns	Campaigns where the Status field is set to Active
All Completed Campaigns	Campaigns where the Status field is set to Completed
All Planned Campaigns	Campaigns where the Status field is set to Planned
Recently Created Campaigns	All campaigns, sorted by the created date, with the most recently created campaign at the top of the list
Recently Modified Campaigns	All campaigns, sorted by the modified date, with the most recently modified campaign at the top of the list
All Campaigns	None. The list shows all campaigns for your company, sorted by Campaign Name, in ascending order.
My Recently Modified Campaigns	All campaigns owned by you. The list is sorted by the modified date, with the most recently modified campaign at the top of the list.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Campaigns

The My Recently Viewed Campaigns section shows the campaigns that you viewed most recently.

Working with Campaign Tasks

The Campaign Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values (on page 1254).

- To review a task, click the Subject link.
- To review the campaign with which the task is associated, click the campaign name.

- To expand the list of tasks, click Show Full List.

Viewing Active Campaigns

The Active Campaigns section shows a list of campaigns that is currently running.

- To view an active campaign, click the Campaign Name field.
- To expand the list, click Show Full List.

Report Sections

One or more report sections might be shown on your Campaign Homepage. Your company administrator can specify which report sections are shown on the page. In the standard edition of Oracle CRM On Demand, the Active Campaign Status section is shown.

Using Reports to Measure Campaign Effectiveness

One or more report sections might be shown on your Campaign Homepage (your company administrator can specify which report sections are shown on the page). In the standard application, the Active Campaign Status section is shown, which displays an analysis of all active campaigns. For more information about using the Active Campaign Status section, see Measuring Campaign Effectiveness (on page 240).

Adding Sections to Your Campaign Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Campaign Homepage, depending on which sections your company administrator has made available for display on your Campaign Homepage.

To add sections to your Campaign Homepage

1. On the Campaign Homepage, click Edit Layout.
2. On the Campaign Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Campaigns

To manage campaigns, do the following tasks:

- Targeting Contacts for Campaigns (on page 239)
- Recording Responses to Campaigns (on page 239)
- Closing Campaigns (on page 240)
- Measuring Campaign Effectiveness (on page 240)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Campaign Fields (on page 240)
- Working with the Campaign Homepage (on page 236)
- Analytics (on page 789)
- Importing Your Data (on page 1827)

Targeting Contacts for Campaigns

You can select contacts that you want to target for a campaign.

NOTE: If your company uses Segmentation Wizard, a downloadable application that works between Oracle CRM On Demand and Excel, you can build target segments that filter records according to criteria from a number of record types. For information about how to download and use Segmentation Wizard, see Using Segmentation Wizard (on page 783).

To target contacts for a campaign

1 Select the campaign.

For instructions on selecting campaigns, see Finding Records (on page 74).

2 On the Campaign Detail page, scroll down to the Recipients section and do the following:

NOTE: If the Recipients section is not visible on the Campaign Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Recipients section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- To target contacts one by one, click Add.
- To remove a contact, click the Remove link in the record row. This disassociates the records without deleting any records.
- To add or remove multiple contacts at one time, click List Add to open the Search for a Contact window, and then do the following:
  - Select each of the contacts that you want to add.
  - Click the Remove link for any contact that you want to remove.
  - When you finish adding and removing contacts, click OK.

  For more information about searching for records in the Search for a Contact window, see Searching for Records in Lookup Windows (on page 101).

  NOTE: The List Add feature does not support the creation of integration events through workflow actions. Similarly, the List Add feature does not support modification tracking. If your company needs to create integration events when campaign records are updated or needs to track run-time modifications to campaign records, then do not use the List Add feature. Instead, add the contacts to the campaign one by one.

3 Save the record.

To import contacts from a file, see Importing Your Data (on page 1827).

Recording Responses to Campaigns

When you want to record the response to a campaign, such as the fact that a recipient attended an event, you can track that in the campaign recipient section.

To record a response to a campaign

1 Select the campaign.

For instructions on selecting campaigns, see Finding Records (on page 74).

Note: If the Recipients section does not appear in the Campaign Detail page, click Page Layout to add it.

2 On the Campaign Detail page, scroll down to the Recipients section, and click Edit for the contact whose response you want to record.

3 On the Campaign Response Edit page, fill in the information.

Field	Description
Delivery Status	The standard values are Pending, Sent, Soft Bounce, Hard Bounce, Unknown Bounce, Received, and Opened. However, your company administrator can rename the options in this drop-down list.
Response Status	The standard values are Click-thru, RSVP - Will Attend, RSVP - Will Not Attend, Attended, Converted to Lead, Requested More Info, Opt-in to List, Opt-out from List, Global Opt-in, Global Opt-out, and Message Opened. However, your company administrator can customize the options in this drop-down list.

4 Save the record.

Closing Campaigns

You can change the campaign status to indicate it is completed.

To close a campaign

1 On the Campaign List page, click in the Status field.

2 Select the Completed status from the drop-down list.

3 Click the green check mark icon in the Status field to save the record.

Measuring Campaign Effectiveness

The Active Campaign Status section of the Campaign Homepage shows an analysis of all active campaigns. You can use this information to determine the effectiveness of your campaigns.

To view information about the effectiveness of your campaigns

- In this section of the Campaign Homepage, do the following:
  - Place your pointer on the chart to see specific information.
  - Click a segment to review a detailed report.
  - Change the categories in the lists to view the same data from a different perspective.

    For example, you can view the analysis of campaigns by the ROI (return on investment), lead-conversion rate, or the cost for each lead.

Campaign Fields

Use the Campaign Edit page to add a campaign or update details for an existing campaign. The Campaign Edit page shows the complete set of fields for a campaign.

TIP: You can also edit campaigns on the Campaign List page and the Campaign Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Campaign Information	
Source Code	Campaign identifier code. Make sure the code you enter is unique. This field has a maximum of 30 characters.
Campaign Name	Descriptive name of the campaign. This field has a maximum of 100 characters.
Campaign Type	Type of campaign, such as Advertisement, Direct Mail, Email, Event - Other, Event - Seminar, Event - Trade Show, List - Purchased, List - Rented, Other, Referral - Employee, Referral - External, or Web Site.
Objective	Description of the campaign's objective, such as "To increase sales by 10%."
Audience	Target audience of the campaign.
Offer	Description of the product or service the campaign is offering.
Status	Campaign status, such as: - **Active.** Start date is in the past and end date is in the future - **Completed.** Start and end dates are in the past. - **Planned.** Start and end dates are in the future. - **Scheduled.** You can manually set this status to indicate that the campaign is ready and is now set to execute at a particular date and time. - **Contact Support.** You can use this status to indicate any issues with the campaign where Oracle Support has to be contacted. Email campaigns set up using Oracle Email Marketing On Demand (EMOD) before it was discontinued used to be updated with this status to indicate that there was a problem with the campaign. You must set the status. The system does not automatically update it when the campaign is launched.
Start Date	Date and time the campaign starts. Defaults to the current date and time. You can use the calendar controls to change this date.
End Date	Date and time the campaign is scheduled to be completed. Defaults to the current date and time. You can use the calendar controls to change this date.
Campaign Currency	Enter the code (such as USD) for the currency used for all revenue fields.

Field	Description
Campaign Plan Information	
Revenue Target	Revenue expected to be generated by the campaign.
Leads Targeted (#)	Number of prospects the campaign targets.
Budgeted Cost	Amount your company budgets for this campaign.
Actual Cost	Amount your company is spending on this campaign.
Additional Information	
Owner	The alias of the owner of the campaign record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run in the Analytics pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Description of the campaign. This field has a limit of 16,350 characters.

Leads

Use the Leads pages to create, update, and evaluate leads. A *lead* is a person who has indicated an interest in your products or services.

You can enter leads manually, or they can be assigned to you. You can follow up assigned leads to determine if they will eventually generate revenue for the company. Creating a lead record is a quick way to gather new customer information. In one record you can enter details about the company, the person, and the business interest, instead of creating four different records for an account, a contact, a deal registration, and an opportunity.

A lead moves through the lead management process in the following sequence of stages: evaluating, qualifying, and converting to an opportunity or deal registration. Instead of qualifying a lead, you might remove it by archiving it. Instead of converting a qualified lead to an opportunity or deal registration, you might reject it. The rest of this topic explains the stages in more detail.

Evaluating Leads

During evaluation, the person evaluating the lead performs a number of ongoing activities:

- Calls, emails, or visits the contact to exchange information.
- Updates specific information about the lead with more accurate and newly discovered information.
- Creates, tracks, and completes activities regarding the lead.
- Logs notes regarding the interaction.

- (Optional but recommended) Links the lead to an account and a contact, which has these advantages:
  - The user assigned to the account or contact (who may or may not also be the user assigned to the lead) can view the lead during the evaluation process, because it will appear in the Account and Contact pages.
  - The lead owner can access additional information about the account or contact by clicking a link.
  - The lead owner can enter more details than can typically be stored with a lead, such as additional contacts at the account, ship to address, and so on.
  - If the lead is converted to an opportunity or deal registration, the existing account and contact links can speed up that process.

Qualifying Leads

The qualification process helps the evaluator to gather enough information to determine which leads to pursue further. When the evaluator determines that a lead has some potential for generating revenue, the evaluator qualifies the lead. The system then checks to make sure that certain critical fields contain data. If the criteria have been met, the lead is marked as qualified, and becomes visible to the sales person as a newly qualified lead.

Qualifying leads accurately helps your company to spend more time working on high-potential business deals. Company administrators can set up Lead Qualification scripts to help evaluators to qualify leads accurately and consistently. (For information on setting up assessment scripts, see Setting Up Assessment Scripts (on page 1865)).

Archiving Leads

Alternatively, if the lead is considered to have no value to the company, then the evaluator can archive the lead. The system then removes the lead from the lead management process.

TIP: To sort archived leads, create a new list called Archived Leads. For more information on creating lists, see Creating and Refining Lists (on page 130).

Converting Leads to Opportunities or Deal Registrations

Leads can be converted to contacts, and optionally to accounts, opportunities, and deal registrations using the Convert Lead page. The Convert Lead page contains lead conversion options as specified in the Lead Conversion layout that is applicable to the user role. If a lead has enough potential value, the evaluator can convert it to an opportunity or a deal registration, so long as a lead conversion layout has all lead conversion options enabled. The system prompts the evaluator for an account to link to the lead, a contact at that account to link to the lead, and an opportunity or deal registration to link to the lead.

Oracle CRM On Demand then creates a new opportunity or deal registration and removes the lead from active evaluation (although it can still be viewed if desired).

If your administrator adds the relevant options to the lead conversion layout, then the evaluator can also do the following when converting a lead:

- Copy the members of the lead team to the team on the account, contact, and opportunity that are created or linked to the lead during the conversion process.

  The team role and access level for the lead team members on an account, contact, or opportunity are determined as follows:
  - **When an existing record is used.** The evaluator must specify the record access level that will be granted to the lead owner in the team on the linked account or contact. All other members of the lead team are given the record access level on the linked record that they have on the lead record. However, if any member of the lead team, including the lead owner, is already a member of the team on the linked record, then the user's access level on the linked record remains unchanged. If any member of the team, including the lead owner, has a team role on the lead, then the user is given the same role on the linked record, unless the user already has a team role on the linked record, in which case the user's role on the linked record remains unchanged.
  - **When a new record is created.** The evaluator must specify the record access level that will be granted to the lead owner in the team on the new record. Other members of the lead team are given the record

access level on the new record that they have on the lead record. If any member of the team, including the lead owner, has a team role on the lead, then the user is given the same role on the new record.

For information about the ownership of the new records, see Ownership of Records Created During Lead Conversion in this topic.

NOTE: If the team role that is assigned to a team member on the lead is not available for the record type of the linked record, then the Team Role field is left blank for that user on the linked record.

- Link the lead's associated custom object records to the account, contact, and opportunity that are created or linked to the lead during the conversion process.

What Happens During Conversion

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. The following table shows an example of how the fields can be mapped among the records. Some of the fields shown in this table are mapped by default, while other fields are not. Your company administrator can determine how the lead fields are mapped for your company. For information about mapping fields for lead conversion, see Mapping Additional Fields During Lead Conversion (on page 1571).

Lead	Account	Opportunity	Contact	Deal Registration
Address	Billing Address	Not applicable	Contact Address	Deal Address
Annual Revenues	Annual Revenues	Not applicable	Not applicable	Not applicable
Approximate Income	Not applicable	Not applicable	Total Income	Not applicable
Associated Company	Not applicable	Not applicable	Not applicable	Associated Company
Associated Contact	Not applicable	Not applicable	Not applicable	Associated Contact
Campaign	Source Campaign **NOTE:** If the account is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the account is created by a user, the user can enter the information in this field.	Source Campaign **NOTE:** If the opportunity is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the opportunity is created by a user, the user can enter the information in this field.	Source Campaign **NOTE:** If the contact is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the contact is created by a user, the user can enter the information in this field.	Not applicable
Cellular Phone #	Not applicable	Not applicable	Cellular Phone #	Cell Phone

Lead	Account	Opportunity	Contact	Deal Registration
City	Billing City Shipping City	Not applicable	Primary City	City (of Deal Address)
Company	Account Name	Account	Account	Company Name
Country	Billing Country Shipping Country	Not applicable	Primary Country	Country
Date of Birth	Not applicable	Not applicable	Date of Birth	Not applicable
Description	Not applicable	Description	Not applicable	Justification
Email	Not applicable	Not applicable	Email	Email
Estimated Close Date	Not applicable	Close Date	Not applicable	Close Date
First Name	Not applicable	Not applicable	First Name	Not applicable
Industry	Industry	Not applicable	Not applicable	Not applicable
Job Title	Not applicable	Not applicable	Job Title	Not applicable
Last Name	Not applicable	Not applicable	Last Name	Not applicable
Lead Currency	Not applicable	Not applicable	Not applicable	Deal Currency
Lead Owner	Not applicable	Not applicable	Not applicable	Not applicable
Lead Type	Account Type	Not applicable	Contact Type	Not applicable
Mr./Ms.	Not applicable	Not applicable	Mr./Ms	Not applicable
Never Email	Not applicable	Not applicable	Never Email	Not applicable
Next Step	Not applicable	Next Step	Not applicable	Next Step
Number of Employees	Number of Employees	Not applicable	Not applicable	Not applicable
Originating Partner	Not applicable	Not applicable	Not applicable	Originating Partner
Potential Revenue	Not applicable	Revenue	Not applicable	Deal Size
Primary Phone #	Not applicable	Not applicable	Work Phone #	Telephone #
Principal Partner	Not applicable	Not applicable	Not applicable	Principal Partner

Lead	Account	Opportunity	Contact	Deal Registration
Product Interest	Not applicable	Opportunity Name becomes: Product Interest (Contact Full Name)	Not applicable	Product Interest
Profession	Not applicable	Not applicable	Profession	Not applicable
Qualified Date	Not applicable	Not applicable	Qualified Date	Not applicable
Rating	Not applicable	Not applicable	Not applicable	Not applicable
Referred by	Not applicable	Not applicable	Referred by	Not applicable
Source	Not applicable	Lead Source	Lead Source	Not applicable
State/Province	Billing State/Province Shipping State/ Province	Not applicable	Primary State/ Province	State (of Deal Address)
Website	Web Site	Not applicable	Not applicable	Not applicable
Work Fax #	Not applicable	Not applicable	Work Fax #	Not applicable
Zip/Postal Code	Billing Zip Code Shipping Zip Code	Not applicable	Primary Zip/Postal Code	Zip (of Deal Address)

Additionally, some fields show different values as a result of the lead conversion process. The following table lists the new values.

This record/field	Changes to this value
Lead record	
Status	Converted
Account record	
Owner	User converting the lead. See the following section, Ownership of Records Created During Lead Conversion.
Opportunity record	
Status	Pending
Sales Stage	Building Vision
Probability	50%

This record/field	Changes to this value
Owner	User converting the lead. See the following section, Ownership of Records Created During Lead Conversion.
Contact record	
Owner	User converting the lead. See the following section, Ownership of Records Created During Lead Conversion.
Deal Registration Record	
Name	Product Interest on the lead. You can override this field.
Type	Standard
Submission Status	Not Submitted.

Ownership of Records Created During Lead Conversion

In the standard application, the following happens when the lead is converted:

- If the Sales Person field on the lead is populated, then the sales person becomes the owner of any new records that are created during the conversion.
- If the Sales Person field on the lead is not populated, then the user converting the lead becomes the owner of any new records that are created during the conversion.

However, the company administrator can change this behavior using the Lead Conversion Mapping feature. For more information, see Mapping Additional Fields During Lead Conversion (on page 1571).

Rejecting Qualified Leads

Qualified leads can also be rejected. This is typically done in organizations where the person or group evaluating leads is different from the sales people who take qualified leads and convert them into revenue. In those organizations, the sales person assigned to a qualified lead may determine that the lead is not as valuable as the evaluator had indicated.

When rejecting a lead, the sales person must specify a Reject Code for the rejection and can optionally specify the Reject Reason as well. If the Reject Code selected is Other, the Reject Reason becomes a required field. The system records that a rejection occurred, who rejected it, and why it was rejected.

The sales person may also choose to have the lead reassigned as part of the rejection. Depending on the company's policies, the lead may be reassigned to a manager for follow-up, or it may go back to the original evaluator for further assessment.

Working with the Leads Homepage

The Leads Homepage is the starting point for managing leads.

NOTE: Your company administrator can customize the layout of your Leads Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Lead

You can create a lead by clicking the New button in the My Recently Viewed Leads section. For more information, see Creating Records (on page 51) and Leads Fields (on page 258).

Working with Leads Lists

The Lead Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for leads.

Leads List	Filter
All Leads	None
All Converted Leads	Displays leads where the Status field is set to Converted
All Leads Being Qualified	Displays leads where the Status field is set to Qualifying
All Qualified Leads	Displays leads where the Status field is set to Qualified
Recently Created Leads	Displays all leads, sorted by the created date
Recently Modified Leads	Displays all leads, sorted by the modified date
All Rejected Leads	Displays leads where the Status field is set to Rejected
My Leads	Displays leads, sorted by the created date, that meet one of the following conditions: ■ The Sales Person field is set to your user name, and the Status field is set to Qualifying. ■ The Lead Owner field is set to your user name, the Sales Person field is empty, and the Status field is set to Qualifying.
My New Leads	Displays leads, sorted by the created date, that meet one of the following conditions: ■ The Sales Person field is set to your user name, and the Status field is set to Qualified. ■ The Lead Owner field is set to your user name, the Sales Person field is set to a user name other than your user name, and the Status field is set to Qualifying.
My Recently Assigned Leads	Displays leads that were assigned to you by the assignment manager. The list is sorted by the last assignment completion date, with the lead that was most recently assigned to you by the assignment manager at the top of the list. You can also see this list in the My Recently Assigned Leads section of the Leads Homepage, if that section is available in the Leads Homepage layout for your role. **NOTE:** When a lead is assigned to you by the assignment manager, an email is automatically sent to you. When you click the URL in the email and then sign in to Oracle CRM On Demand, you are redirected to the My Recently Assigned Leads list automatically.

Leads List	Filter
My Recently Created Leads	Displays all leads that you own. The list is sorted by the created date, with the most recently created lead at the top of the list.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Leads

The My Recently Viewed Leads section shows the leads that you viewed most recently.

Working with Lead Tasks

The My Open Lead Related Tasks section shows the tasks assigned to you, sorted by due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values (on page 1254).

- To review a task, click the Subject link.
- To review the lead with which the task is associated, click the lead name.
- To expand the list of tasks, click Show Full List.

Viewing Qualified Leads

The Qualified Leads section shows a list of qualified leads. The Full Name field is a link that opens the lead record.

- To open the lead record, click the Full Name field.
- To expand the list, click Show Full List.

Using Reports to Analyze Lead Followup

One or more report sections might be shown on your Leads Homepage. Your company administrator can specify which report sections are shown on the page. In the standard edition of Oracle CRM On Demand, the Lead Followup Analysis section is shown, which displays the progress made towards qualifying leads in the last 90 days. For information about using the Lead Followup Analysis section, see Analyzing Lead Followup (on page 258).

Adding Sections to Your Leads Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Leads Homepage, depending on which sections your company administrator has made available for display on your Leads Homepage.

To add sections to your Leads Homepage

1. On the Leads Homepage, click Edit Layout.
2. On the Lead Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Leads

To manage leads, do the following tasks:

- Reassigning Leads (on page 250)
- Qualifying Leads (on page 251)
- Using Lead Qualification Scripts (on page 251)
- Archiving Leads (on page 252)
- Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 252)
- Rejecting Leads (on page 257)
- Analyzing Lead Followup (on page 258)
- Sending Marketing Emails Using Oracle Eloqua Engage (on page 303)

NOTE: If you are using Oracle CRM On Demand Financial Services Edition and taking advantage of the Referrals feature, new leads are created when you link new referrals to contacts.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Reassigning Leads

If your access levels permit you to do so, you can manually reassign a lead by changing the owner or primary custom book on the lead record.

NOTE: Depending on the record ownership mode that your company administrator configures for the Lead record type, you can assign a lead record to an owner or to a primary custom book; however, you cannot assign a lead record to both an owner and a primary custom book. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

If your company uses the assignment manager and the Lead record type is configured for the user mode or mixed mode of record ownership, then you can also reassign a lead to a new owner by selecting the Reassign Owner check box on the request.

To reassign a lead

1. Select the lead you want to reassign.

   For instructions on selecting leads, see Finding Records (on page 74).

2 On the Lead Detail page, click Edit.
3 On the Lead Edit page, do one of the following:
   - In the Owner Full Name field or the Book field, click the Lookup icon, and then select another user or book in the Lookup window.
   - Select the Reassign Owner check box to trigger the assignment manager to reassign the lead.

   NOTE: The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
4 Save your changes.

NOTE: The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load.

Qualifying Leads

If you determine that a lead has some potential for becoming an opportunity, you can qualify the lead. Normally, you select a rating for the lead according to a scale set up by your company administrator.

NOTE: Your company administrator might have set up assessment scripts to help you to evaluate leads for qualification. For more information on using Lead Qualification scripts, see Using Lead Qualification Scripts (on page 251).

Before you begin. To perform this procedure, your user role must include the Qualify Leads privilege.

To qualify a lead

1 Select the lead.

   For instructions on selecting leads, see Finding Records (on page 74).
2 On the Lead Detail page, make sure that the necessary fields are populated.

   For information about the fields that must be populated before a lead can be qualified, see Required Fields for Lead Qualification (on page 252).
3 Click Mark as Qualified.

   The system verifies that the critical fields contain data. If the criteria are met, the lead Status field value changes to Qualified.

   NOTE: If you receive an error message after clicking Mark as Qualified, verify that the Qualified Date field has not been customized with a read-only value.

Using Lead Qualification Scripts

Your company administrator might have set up assessment scripts to help you to evaluate leads for qualification. A Lead Qualification script consists of a series of questions that you use to collect customer data. Your responses are scored, assigned a weighting, and compared with a specified threshold to determine the appropriate outcome or course of action.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see About Assessment Scripts (on page 1865).

NOTE: For information about the fields that must be populated before a lead can be qualified, see Required Fields for Lead Qualification (on page 252).

To use a lead qualification script

1 Select the lead.

   For more information on selecting leads, see Finding Records (on page 74).

2 On the Lead Detail page, scroll down to the Lead Qualification Scripts section, and click Add.

   NOTE: If the Lead Qualification Scripts section is not shown, click the Edit Layout link in the upper-right corner of the page, and add the Lead Qualification Scripts section to your page layout. This section is only available if the company administrator has set up a Lead Qualification script.

3 In the Lookup window, search for the appropriate script, and click Select. You can use the filter fields at the top of the Lookup window to filter the list of scripts.

4 In the Lead Qualification Scripts window, select the answer for each script question, and click Save.

   The Lead Detail page appears again. Depending on the outcome of the script, some of the fields on the record might have been updated automatically.

Required Fields for Lead Qualification

For the status of a lead to be set to Qualified, certain fields on the lead are always required and other fields might also be required, as follows:

- The First Name and Last Name fields are always required.
- In the standard application, the following fields are also required: Owner Full Name, Rating, and Sales Person. This is true both in the case where you qualify a lead directly and also where you use a lead qualification script. If a lead qualification script attempts to set the Status field on a lead to Qualified, and if one or more of the required fields is not populated, then an error message is displayed and the script assumes the lead has failed to meet the threshold for qualification that is defined on the script. The script then sets the Status field according to the results defined on the script for failing to meet the threshold.

  Your administrator can change the behavior so that the Owner Full Name, Rating, and Sales Person fields are not required for lead qualification by deselecting the following setting on the company profile: Enable Owner Full Name, Rating and Sales Person Are Required to Qualify a Lead.
- Your company can optionally create a business process to specify that one or more fields must be populated or must have a certain value before the status of a lead can be set to Qualified. To do this, your administrator sets up a business process for the Lead record type, with a transition state for the Qualified status value. For information about setting up business processes, see Process Administration (on page 1479).

Archiving Leads

Instead of qualifying a lead, you can specify that it is not worth pursuing and remove it from the assessment process. Archiving a lead does not delete it, but retains the lead in the database with a status of Archived.

Before you begin. To perform this procedure, your user role must include the Archive Leads privilege.

To archive a lead

1 Select the lead you want to archive.

   For instructions on selecting leads, see Finding Records (on page 74).

2 On the Lead Detail page, click Archive.

   The lead Status field changes to Archived.

Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities

If your user role has the appropriate setup, you can create account, contact, deal registration, and opportunity records, or copy lead information to existing records by converting the lead record. Depending on your company's settings, the new opportunity record can include information that affects revenue calculations. For further information about the conversion process and its impact on fields and values, see What Happens During Conversion in Leads (on page 242).

NOTE: Normally, you convert leads to opportunities that have previously been qualified. See Qualifying Leads (on page 251).

The procedure in this section describes the steps for these two scenarios:

Scenario 1. You have new leads resulting from a campaign your company conducted. As part of each lead record, you have a person's name along with their company name. You now want to create a new contact, a new account, and, potentially, a new opportunity record using information from the lead.

Scenario 2. You run a campaign targeted at existing accounts and contacts. Some leads are generated that you now want to convert to opportunities.

Before you begin. To perform this procedure, your user role and access profile settings must be set up as described in Access Profile and Role Settings for Converting Leads (on page 255). The Convert Lead page shows only the conversion options that are available to your user role, according to the lead conversion layout that has been selected for the role. If a lead conversion layout has not been selected for the role, the default lead conversion layout applies.

To convert a lead to an account, contact, deal registration, or opportunity

1. Select the lead you want to convert.

   For instructions on selecting leads, see Finding Records (on page 74).
2. On the Lead Detail page, click Convert.
3. On the Convert Lead page, do one of the following:
   - To create new account and contact records for this lead (Scenario 1), select the Auto-create New Account and Auto-create New Contact options.

     In the Account section, the Company field for the lead appears in the Account Name field by default. In the Contact section, the First Name and Last Name for the lead appear by default.
   - To create a new opportunity and link the opportunity to an existing account and contact, select the Use Existing Account and Use Existing Contact options.

     If the lead record has an associated account, this account appears in the Associated Account field. If the lead record has an associated contact, this contact appears in the Associated Contact field.
   - To link the lead to a different account or contact, click the Lookup icon next to the Associated Account or Associated Contact fields and select another account and contact. Make sure the proper names appear in the Associated Account and Associated Contact fields and that the Use Existing Account and Use Existing Contact option buttons are selected.
4. (Optional) To convert the lead to an opportunity, select the Auto-Create New Opportunity option and complete the fields.

   NOTE: The first name and last name from the lead record appear in the Associated Opportunity field by default, and you can edit this field. In the standard application, the Revenue, Close Date, Next Step, and Description fields also appear in the Opportunity section of the Convert Lead page. You can edit these fields here, and their values are carried into the opportunity record. Depending on how your administrator sets up the layout for the Convert Lead page, you might see different fields.
5. If you want to copy the lead team to the team on the account, contact, or opportunity, do the following:
   a. Select the Copy Lead Team check box in the appropriate section of the page. For example, if you want to copy the lead team to the new opportunity, then select the Copy Lead Team check box in the Opportunity section of the page.
   b. Choose the record access level that you want to grant to the lead owner in the appropriate section of the page. For example, if you selected the Copy Lead Team check box in the Opportunity section of the page,

then in the Lead Owner Record Access in Opportunity Team field, choose the record access level that you want to grant to the lead owner on the new opportunity.

NOTE: Your administrator can enable team inheritance for the Contact and Opportunity record types by selecting the Enable Parent Team Inheritance for Contact check box and the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page. If team inheritance is enabled for the Contact or Opportunity record type, then the contact or opportunity team automatically inherits the team members of the account that is linked to the lead during the lead conversion, even if the Copy Lead Team check box is not selected in the Contact or Opportunity section of the Convert Lead page.

6. To associate the lead's associated records of a given custom object record type with the account, contact, or opportunity, select the check box to associate that custom object record type in the appropriate section of the page.

   NOTE: Your administrator determines which Custom Object record types can be associated with the records, by making the relevant options available when setting up the layout for the Convert Lead page.

7. (Optional) To convert the lead to a deal registration, select the Auto-Create Deal Registration option and complete the fields.

   NOTE: The values of the Product Interest field and the Principal Partner Account field from the lead record appear in the Deal Registration Name field and Principal Partner Account field respectively by default, and you can edit these fields. In the standard application, the Revenue, Close Date, Next Step, and Description fields also appear in the Deal Registration section of the Convert Lead page. You can edit these fields here, and their values are carried into the deal registration record. Depending on how your administrator sets up the layout for the Convert Lead page, you might see different fields.

8. To convert the lead, click Save.

When the conversion is completed:

- The Lead Detail page appears again with these values, most based on the selections you made on the Convert Lead page:
  - The Status field for the lead is Converted.
  - The Associated Account and Associated Contact field values are the same as the ones that were on the Convert Lead page.
  - If you converted the lead to an opportunity, the Associated Opportunity field value is the same as the new opportunity name that was on the Convert Lead page.
  - If you converted the lead to an opportunity, the new opportunity record created from the conversion process has the converted lead linked to the opportunity record.
  - If you converted the lead to a deal registration, the Associated Deal Registration field value is the same as the new deal registration name that you specified on the Convert Lead page.
  - If you converted the lead to a deal registration, the new deal registration record created from the conversion process is also linked to the converted lead.
- If you converted the lead to an opportunity (Step 4) or deal registration (Step 7), the new opportunity or deal registration record inherits some field values from the lead.
- You can still view the lead record, but the business processes shift to the appropriate opportunity or deal registration record.

NOTE: You can convert the same lead to an account or contact multiple times, but you can only convert a lead to a deal registration or opportunity once. If you have converted a lead to a deal registration or opportunity, you cannot later convert it to a different deal registration or opportunity. However, a lead that has been converted to a deal registration can be re-converted to a different account or contact.

Access Profile and Role Settings for Converting Leads

To convert leads to accounts, contacts, deal registrations, or opportunities, you must have the appropriate settings in your user role and in your access profiles. Depending on the record types that are involved in a lead conversion process and on how your company administrator sets up the Lead Conversion page, one or more of the following options can be available for converting a lead:

- Do Not Convert
- Auto-Create
- Use Existing

This topic describes the role and access profile settings that are required to convert a lead depending on which of the available options is used and on the record types that are involved in the conversion process.

Role Settings for Converting Leads

To convert a lead to a record of a given record type, your user role must be set up as follows:

- The Convert Leads privilege must be enabled.
- To enable you to convert a lead to another record type using the Use Existing option, the Has Access setting must be enabled for the relevant record type.
- To enable you to convert a lead to another record type using the Auto-Create option, the Has Access and Can Create settings must be enabled for the relevant record type.

Access Profile Settings for Converting Leads

The following tables show the minimum access levels that enable you to convert leads. The access levels shown here must be available on the access profile that Oracle CRM On Demand uses to extract your access level for a record of a given record type.

The following table shows the minimum access level required for the Lead record type.

Record Type	Access Level
Lead	Read/Edit

The following table shows the minimum access level required for the record types that are related to the Lead record type.

Record Type	Related Record Type	Access Level
Lead	Completed Activities	Read/Edit
	Open Activities	Read/Edit
	Custom Objects 01 through 03	Read
	Custom Objects 04 through 40	Read/Edit
	Lead Teams	Read/Edit

The following table shows the minimum access level required for the other top-level record types that are involved in the conversion process, depending on the option that you choose in the conversion process.

NOTE: If you choose the Do Not Create option for a record type on the Lead Conversion page, then the level of access that you have to the record type is not relevant.

Record Type	Use Existing	Auto-Create
Account	Read-Only	Read-Only
Activity	Read-Only	Read-Only
Contact	Read-Only	Read-Only
Deal Registration	Not Applicable	Read-Only
Opportunity	Not Applicable	Read-Only

The following table shows the minimum access level required for the related record types, depending on the option that you choose in the conversion process.

Record Type	Related Record Type	Use Existing	Auto-Create
Account	Account Team	Read/Create/Edit	Read/Create/Edit
	Addresses	Read-Only	Read/Create if the lead contains an address; otherwise, the access level is not relevant
	Custom Objects 01 through 03	Read/Create/Edit	Read/Create/Edit
Contact	Accounts	Read-Only	Read-Only
	Addresses	Read-Only	Read/Create if the lead contains an address; otherwise, the access level is not relevant
	Contact Team	Read/Create/Edit	Read/Create/Edit
	Custom Objects 01 through 03	Read/Create/Edit	Read/Create/Edit

Record Type	Related Record Type	Use Existing	Auto-Create
Opportunity	Contacts	Not Applicable	Read/Create
	Custom Objects 01 through 03	Read/Create/Edit	Read/Create/Edit
	Opportunity Team	Read/Create/Edit	Read/Create/Edit
	Revenues	Not Applicable	Read/Create/Edit

Access to Activities and Custom Object Records Associated with Leads

In the standard application, a lead conversion fails if you do not have edit access to all of the following:

- The lead's associated activities.
- The lead's associated records of a custom object record type, if you select the option to associate those records with the account, contact, or opportunity in the Convert Lead page.

However, if your administrator selects the Convert Only Editable Related Objects setting on the company profile, then you can successfully convert a lead even if you do not have edit access to all of the activities and relevant custom object records that are associated with the lead. In that case, only the associated records to which you have edit access are linked to the records that are created or updated after the conversion.

For information about how Oracle CRM On Demand determines which access profile to use, see the following topics:

- How Access Rights for Working with Primary Record-Type Records Are Determined (on page 1464)
- How Access Rights for Working with Related Record-Type Records Are Determined (on page 1467)

NOTE: To convert leads to deal registrations, your company must be set up to use Oracle CRM On Demand Partner Relationship Management Edition. For more information on configuring Partner Relationship Management, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*.

Rejecting Leads

Instead of converting a qualified lead to an opportunity, you might decide that the lead is not as valuable as the evaluator indicated and remove it from the lead management process. Rejecting a lead does not delete it, but retains the lead in your company's records with a status of Rejected.

Before you begin. To perform this procedure, your user role must include the Reject Leads privilege.

To reject a qualified lead

1. Select the lead you want to reject.

   For instructions on selecting leads, see Finding Records (on page 74).
2. On the Lead Detail page, click Reject.
3. On the Reject a Lead page, enter this information:
   - In the Reject Code field, select a value from the drop-down list.

     NOTE: The Status field is displayed in the Reject a Lead page. It is read-only and is set to Rejected. Your administrator can restrict the values that are available for selection in the Reject Code field by defining a cascading picklist that has the Status field as the parent picklist and the Reject Code field as the related picklist.

- (Optional) In the Reject Reason field, enter the reason for the rejection.

  NOTE: If the Reject Code is set to Other, the Reject Reason field is required.

- To reassign the lead to a new owner, select the Reassign Owner check box.

  If your company administrator has set up lead assignment rules, then selecting the Reassign Owner check box triggers the assignment manager to reassign the lead by using the lead assignment rules. Depending on your company's policies, the rejected lead may be reassigned to the original owner or to the original owner's manager. The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

4 Click Confirm Reject.

  The Lead Detail page reappears with information about the rejection, including your name, Reject Code, and, if specified, the reason for the rejection. The lead Status field value is changed to Rejected.

Analyzing Lead Followup

In the standard edition of Oracle CRM On Demand, the Lead Followup Analysis section of the Leads Homepage provides information to help you to analyze the progress made towards qualifying leads in the last 90 days.

In this section of the Leads Homepage, you can do the following:

- Evaluate the performance of the sales team from different perspectives.
- View the lead status for each sales team member by selecting Lead Owner or Sales Person.
- View data by month or week to see the status of leads for those periods.
- Identify what actions are required to move the leads through the sales process.
- Click a segment on the chart to view a lead list.
- Download or print these analyses.

Leads Fields

Use the Lead Edit page to add a lead or update details for an existing lead. The Lead Edit page shows the complete set of fields for a lead.

TIP: You can also edit leads on the Leads List page and the Lead Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Lead Information	
Company	For a company, corresponds to the account name.
Email	The email address of the lead. For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses (on page 61).

Field	Description
Never Email	Indication of the lead’s preference to receive emails or not.
Opportunity Related Information	
Status	Status of the lead, such as Qualifying, Qualified, Converted, Rejected, and Archived. Can only be changed on the Lead Edit page, *not* on the New Lead page. For more information about this field’s values and their meanings, see Status Field Values below.
Rating	Scale rating as set up by your company, such as A = Hot, B = Warm, C = Cool, and D = Cold.
Product Interest	Product or service in which the lead expresses interest.
Potential Revenue	Potential revenue, in the currency selected by you or your company administrator.
Estimated Close Date	Date and time the lead is expected to close.
Next Step	Description of the next step to take.
Source	Source categories as set up by your company, such as Advertising, Direct Mail, Event, Promotion, Referral, Trade Show, Web, Partner, Purchased, Rented, and Other.
Campaign	Campaign that generates this lead or is linked to this lead.
Industry	Industry category for the lead as set up by your company.
Annual Revenues	Annual revenue for the lead’s company.
Additional Information	
Associated Account	Account linked to this lead. Required for converting leads to opportunities.
Associated Contact	Contact linked to this lead. Required for converting leads to opportunities.
Associated Deal Registration	Deal Registration linked to this lead. This field is automatically set when a lead is converted to a deal registration.
Associated Opportunity	Opportunity linked to this lead. Required for converting leads to opportunities.
Owner	The owner of the lead record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields

Field	Description
	might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Owner Full Name	The owner of the lead record.
Reassign Owner	Indicates that the lead should be reassigned. If your company administrator has set up lead assignment rules, selecting this field triggers the assignment manager in Oracle CRM On Demand to process the lead again and assign it according to the rules. The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47). **NOTE:** The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load. The name of the lead owner changes when the record is reassigned.
Sales Person	The name of the sales person your company assigns to this lead. Depending on how you associate an account with a lead, the Sales Person field on the lead might be updated automatically, as follows: - If you explicitly associate an account with a lead by selecting an account in the Associated Account field on the lead record, and if the account has an owner assigned to it, then the Sales Person field on the lead is automatically populated with the name of the owner of the account that you select, provided that the Auto-Update Sales Person Field When Associating Account on Lead Record setting is selected on the company profile. If that setting is deselected, then the Sales Person field on the lead is not automatically populated. - If you create a lead as a related record for an account, then the Associated Account field on the lead record is populated with the name of the account, but the Sales Person field on the lead record is not automatically populated, even if the Auto-Update Sales Person Field When Associating Account on Lead Record setting is selected on the company profile.
Description	Additional information describing the lead. Limit of 16,350 characters.
Web Site	The web site linked to the lead.
Ownership Status	The current status of ownership for the lead.
Profession	This field is specific to Oracle CRM On Demand Financial Services Edition.
Approximate Income	This is a currency field. This field is specific to Oracle CRM On Demand Financial Services Edition.
Date of Birth	This field is specific to Oracle CRM On Demand Financial Services Edition.

Field	Description
Age	This field is calculated from the Date of Birth field. This field is specific to Oracle CRM On Demand Financial Services Edition.
Qualified Date	Automatically populated with the current date when the Status field is set to Qualified.

Status Field Values

As a lead moves through the lead management process, the lead Status field indicates where it is in the process. Status values are a main way of filtering leads. For more information about the lead management process, see Leads (on page 242).

The following table lists the status field's possible values.

Status	Description
Archived	Results from completion of the Archiving steps (Archiving Leads (on page 252)). Lead is determined to have no value to your company and is removed from the assessment process.
Converted	Results from completion of the Converting steps (Converting Leads to Accounts, Contacts, Deal Registrations, or Opportunities (on page 252)). Lead is determined to have enough value to become an opportunity.
Qualified	Results from completion of the Qualifying steps (Qualifying Leads (on page 251)). Lead has passed the Qualify process. New owner becomes the salesperson assigned to the lead.
Qualifying	Results from completion of the Creating steps (Qualifying Leads (on page 251)). Lead has been created and is undergoing or about to start the Qualifying process. Owner defaults to the person who created the lead.
Rejected	Results from completion of the Rejecting steps (Rejecting Leads (on page 257)). Qualified lead is determined not to have as much value as the evaluator originally thought.

4 Sales

Oracle CRM On Demand provides the following record types for sales information:

- **Accounts.** Use these pages to manage information about the companies with whom you do business.
- **Contacts.** Use these pages to track people associated with your accounts and opportunities.
- **Opportunities.** Use these pages to manage potential revenue-generating opportunities.
- **Forecasts.** Use these pages to generate forecasts to project quarterly revenue based on the existing opportunities.

The Leads record type is also related to the sales area, because leads might be converted to opportunities.

Oracle CRM On Demand also provides the following record types for sales and business planning information:

- **Business Plan.** Use these pages to establish strategic goals and actions for accounts, contacts, or products.
- **Objective.** Use these pages to manage higher-level goals that you want to achieve.
- **Plan Account.** Use these pages to track how accounts are mapped to business plans.
- **Plan Contact.** Use these pages to associate contacts with business plans.
- **Plan Opportunity.** Use these pages to associate opportunities with business plans

Managing Sales

To manage sales, perform the following processes:

1. Process of Managing Opportunities (on page 263)
2. Process of Managing Accounts (on page 264)
3. Process of Managing Contacts (on page 264)
4. Process of Managing Forecasts for Sales Users (on page 265)
5. Process of Managing Forecasts for Forecast Administrators (on page 265)
6. Process of Managing Calendar and Activities (on page 265)

Process of Managing Opportunities

To manage opportunities, perform the following tasks:

1. Review opportunity fields and related information, see Opportunity Fields (on page 326).
2. Create a new opportunity record, see Creating Records (on page 51).
3. Add product revenue records to the opportunity, see Linking Products to Opportunities (on page 316).
4. Define the key contacts and contact roles, see Contacts (on page 287) and Adding Roles (on page 1396).
5. Track activities and notes that are related to opportunities, see Activity Fields (on page 229) and Adding Notes (on page 157).
6. Assign opportunity ownership and visibility, see Access Profile Management (on page 1403) and Sharing Records (Teams) (on page 146).

7 Update the opportunity sales stage, see About Opportunities and Forecasts (on page 309).

8 Link partners and competitors related to the opportunity, see Tracking Partners and Competitors of Opportunities (on page 314).

9 Assess and forecast the opportunity, see About Opportunities and Forecasts (on page 309).

10 Track the opportunity assets, see Tracking Assets (on page 278).

Process of Managing Accounts

To manage accounts, perform the following tasks:

1 Review the account fields and related information, see Account Fields (on page 284).

2 Create a new account record, see Creating Records (on page 51).

3 Define the key contacts and contact roles, see Contacts (on page 287) and Adding Roles (on page 1396).

4 Track the account-related activities and notes, see Activity Fields (on page 229) and Adding Notes (on page 157).

5 Assign the account ownership and visibility, see Access Profile Management (on page 1403) and Sharing Records (Teams) (on page 146).

6 Associate partners and competitors with the account, see Tracking Partners and Competitors of Accounts (on page 276).

7 Define the account relationships, see Tracking Relationships Between Accounts (on page 273).

   Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

8 Add the revenue records to the account, see Tracking Revenue Based on Accounts (on page 280).

   Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

9 Forecast the account revenue, see Tracking Revenue Based on Accounts (on page 280).

   Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

10 Track the account assets, see Tracking Assets (on page 278).

Process of Managing Contacts

To manage contacts, perform the following tasks:

1 Review the contact fields and related information, see Contact Fields (on page 305).

2 Create a new contact record, see Creating Records (on page 51).

3 Track the contact-related activities and notes, see Activity Fields (on page 229) and Adding Notes (on page 157).

4 Assign contact ownership and visibility, see Access Profile Management (on page 1403) and Sharing Records (Teams) (on page 146).

5 Complete a customer satisfaction survey, see Using Assessment Scripts (on page 168).

6 Define the contact relationships, see Tracking Relationships Between Contacts (on page 298).

   Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

7 Add the revenue records to the contact, see Tracking Revenue Based on Contacts (on page 299).

   Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

8 Forecast the contact revenue, see Tracking Revenue Based on Contacts (on page 299).

   Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

9 Track the contact assets, see Tracking Assets (on page 278).

Note: This step is specific to Oracle CRM On Demand Financial Services Edition.

Process of Managing Forecasts for Sales Users

To manage forecasts, perform the following tasks:

1 Set the quotas, see Managing Quotas (on page 335).
2 Forecast the opportunities, accounts, and contacts, see Forecasts (on page 329).
3 Review the forecasts, see Reviewing Forecasts (on page 331).
4 Update the forecasts, see Refreshing Forecasts (on page 332).
5 Submit the forecasts, see Submitting Forecasts (on page 334).

Process of Managing Forecasts for Forecast Administrators

To manage forecasts, perform the following tasks:

1 Set up the company's fiscal calendar, see Setting Up Your Company Profile and Global Defaults (on page 1123).
2 Determine the forecast hierarchy, see Setting Up the Forecast Definition (on page 1575).
3 Set the user quotas, see Setting Up Users' Sales Quotas (on page 1377).
4 Create the forecast definition, including Date, Type, Duration, and Participants, see Setting Up the Forecast Definition (on page 1575).

Process of Managing Calendar and Activities

To manage calendar and activities, perform the following tasks:

1 Review the current calendar appointments, see Calendar and Activities (on page 189).
2 Create the new appointments and tasks, see Creating Activities (on page 199).
3 Share your calendar with other users, see Viewing the Calendars of Other Users (on page 222).
4 Track and manage the key tasks, see Calendar and Activities (on page 189).

Leads (Sales Aspects)

Leads play an important role in the sales process. The sales process might originate with lead generation. Leads move progressively through qualification to conversion. For more information about the sales process, see Managing Marketing (on page 235). You can convert leads to contacts, accounts, deal registrations, and opportunities. After a lead has been converted to an opportunity or deal registration, it enters the sales process. Certain fields in the opportunity or deal registration record obtain their values from the lead record. These values are based on mapping the leads that have been converted during the sales process.

Accounts

Use the Account pages to create, update, and track accounts. *Accounts* are generally companies that you do business with, but you can also track partners, competitors, affiliates, and so on as accounts.

If account records are central to how your company manages its business, as is the case in many companies, enter as much information about accounts as you can. Some of that information, such as the Region or Industry field, can be used in reports as a way to categorize information. Similarly, if you link a record, such as an opportunity, to an account record with the Region or Industry field filled in, those opportunities can be categorized by those values.

Related Topics

See the following topic for related information:

- Managing Accounts (on page 267)

Working with the Account Homepage

The Account Homepage is the starting point for managing accounts.

NOTE: Your company administrator can customize the layout of your Account Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating an Account

You can create an account by clicking the New button in the My Recently Viewed Accounts section. For more information, see Creating Records (on page 51) and Account Fields (on page 284).

Working with Account Lists

The Account Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for accounts.

Account List	Filters
All Accounts	All accounts, sorted alphabetically by Account Name
All Customer Accounts	Accounts where the account type is set to customer
All Account Competitor Accounts	Accounts where the account type is set to competitor
All Account Partner Accounts	Accounts where the account type is set to partner
All Prospect Accounts	Accounts where the account type is set to prospect
Recently Created Accounts	All accounts, sorted by the created date
Recently Modified Accounts	All accounts, sorted by the modified date
All Referenceable Accounts	Accounts with the Reference check box selected
All Top Accounts	Accounts where the priority is set to high
My Accounts	Accounts where your name is in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Accounts

The My Recently Viewed Accounts section shows the accounts that you viewed most recently.

Working with Account Tasks

The My Open Account Related Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values (on page 1254).

- To review a task, click the Subject link.
- To review the account with which the task is associated, click the account name.
- To expand the list of tasks, click Show Full List.

Using Reports to Analyze Account Performance

One or more report sections might be shown on your Account Homepage (your company administrator can specify which report sections are shown on the page). In the standard edition of Oracle CRM On Demand, the Account Analysis section is shown, which displays a comprehensive analysis of how accounts are distributed and of the closed revenue. For information about using the Account Analysis section, see Analyzing Account Performance (on page 284).

Adding Sections to Your Account Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Account Homepage, depending on which sections your company administrator has made available for display on your Account Homepage.

To add sections to your Account Homepage

1. On the Account Homepage, click Edit Layout.
2. On the Account Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Accounts

To manage accounts, perform the following tasks:

- Reassigning Accounts (on page 268)
- Changing an Account Primary Contact (on page 269)
- Linking Records to Accounts (on page 270)
- Linking Portfolio Accounts (on page 272)
- Specifying Parent Accounts (on page 272)
- Limiting Account Records Displayed (on page 273)

- Tracking Relationships Between Accounts (on page 273)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Tracking Relationships Between Accounts and Contacts (on page 274)
- Tracking Partners and Competitors of Accounts (on page 276)
- Tracking Assets (on page 278)
- Tracking Revenue Based on Accounts (on page 280)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Tracking Visits (Sales Calls) to Customers (on page 208)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Creating Appointments for Multiple Accounts (on page 282)
- Analyzing Account Performance (on page 284)

If your user role includes the Maps Integration privilege, then you can also perform this procedure, Performing Proximity Searches (on page 364).

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Using Assessment Scripts (on page 168)
- Sharing Records (Teams) (on page 146)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Account Fields (on page 284)
- Working with the Account Homepage (on page 266)
- Displaying Images on Record Detail Pages (on page 70)
- Working with Oracle Social Network (on page 418)
- Analytics (on page 789)
- Importing Your Data (on page 1827)

Reassigning Accounts

If your access levels permit you to do so, you can reassign an account manually by changing the owner or primary custom book on the account record.

NOTE: Depending on the record ownership mode that your company administrator configures for the Account record type, you can assign an account record to an owner or to a primary custom book; however, you cannot assign an account record to both an owner and a primary custom book. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

If your company uses the assignment manager and the Account record type is configured for the user mode or mixed mode of record ownership, then you can also reassign an account to a new owner by selecting the Reassign Account check box on the request.

To reassign an account

1 Select the account that you want to reassign.

   For information on selecting accounts, see Finding Records (on page 74).

2 On the Account Detail page, click Edit.

3 On the Account Edit page, do one of the following:

   - In the Owner field or the Book field, click the Lookup icon, and then select another user or book in the Lookup window.
   - Select the Reassign Account check box to trigger the assignment manager to reassign the account.

   NOTE: The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

4 Save your changes.

NOTE: The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load.

Changing an Account Primary Contact

An account can have multiple contacts, but one of the contacts must be specified as the primary contact for the account. By default, the first contact added for the account is the primary contact, but you can change this setting.

To change an account primary contact

1 Select the account.

   For instructions on selecting accounts, see Finding Records (on page 74).

2 On the Account Detail page, click Edit.

   NOTE: If the Primary Contact field is not displayed on the Account Detail and Account Edit page, contact your company administrator to have the field added to your page layout.

   TIP: If the inline edit feature is enabled for your company, you can change the primary contact inline on the Account Detail page. For more information on inline editing, see Updating Record Details (on page 115).

3 On the Account Edit page, click the Lookup icon on the Primary Contact field.

4 In the Lookup window, select the new primary contact.

   NOTE: Only those contacts that are already linked to the account are available for you to select as the Primary Contact on the account. In addition, if the Account Contact List field appears in the Lookup window, then only the Contact list, which contains the contacts already linked to the account, is available for selection in the Account Contact List field. You cannot select a different list to search for a contact.

5 On the Account Edit page, click Save.

NOTE: In the Contacts related information section of the Account Detail page, the primary contact for the account always appears as the first contact in the list of contacts that are linked to the account, even if the Primary Contact check box is not shown in the Contacts related information section of the Account Detail page. If you click Show

Full List to open the full list of linked contacts, then the primary contact might appear as the first record on the list page, even if you sort the list using a field such as Last Name or First Name.

The position of the primary contact in the list depends on how many records are in the list and the number of records that you display on your list page. For example, assume that you have a total of 180 contacts linked to an account, the last name of the primary contact for the account begins with the last letter of the alphabet, and you display 100 records on your list page. In that case, the primary contact appears as the first record in the second page of your list when you sort the list using the Last Name field.

Linking Records to Accounts

You can link the new records you create from the Detail page, such as contacts and activities, to the account record. Linking associates records to each other so that you and others who have access rights to the record get a full view of the information.

New records are added to the database at the same time they are linked to the selected account. For example, a contact you create from the Account Detail page is linked to the account and then appears on the Contacts pages.

An account record contains information that, after linking to another record, is inherited. For example, some opportunity reports display the records by Region or Industry. Since Region and Industry are not part of the opportunity records, the system looks to linked account records to determine which group the opportunity belongs to. Therefore, whenever possible, you want to link records to the account record.

You can also link other users to an account record to allow them to view the record. For example, you might need to share an account record with a team of colleagues you are working with to close a deal. Based on each role, a team member might have different access requirements for the account record, and the contact and opportunity records that are linked to the account.

To link information to an account

1. Select the account.

   For instructions on selecting accounts, see Finding Records (on page 74).
2. On the Account Detail page, scroll to the appropriate section, and link records to the account, as necessary.

   NOTE: Your company administrator determines the type of related information that can be displayed on your Account Detail page. You can change the order of the related information sections that are available to you or hide any related information that you are not using. For information about personalizing Detail page layouts, see Changing Your Detail Page Layout (on page 749).

   The following table lists some of the record types that you might be able to link to an account.

Record Type	Information
Opportunities	To link a new opportunity, click New, enter the required information in the Edit form, and save the record. For field descriptions, see Opportunity Fields (on page 326).
Service Requests	To link a new service request, click New, enter the required information in the Edit form, and save the record. For field descriptions, see Service Request Fields (on page 401).
Notes	To link a new note, click New, enter the required information, and save the record. **NOTE:** You can also add notes by clicking the note icon at the top-right of the page, if this feature is enabled for your company.

Record Type	Information
	For more information about notes, see Adding Notes (on page 157).
Open Activities (Appointments and Tasks)	To link a new task or appointment, click New Task or New Appt. Then enter the required information in the Edit form, and save the record. For field descriptions, see Activity Fields (on page 229). You can link several activities to an account. If an activity has a time associated with it, the activity appears in the Activities list and Calendar. Users that have visibility to an account can also see the activities linked to the account, including those activities owned by or assigned to others.
Contacts	To link a new contact, click New, enter the required information in the Edit form, and save the record. For field descriptions, see Contact Fields (on page 305). **TIP:** To avoid duplicating contact records, you can also click Add, and then click the Lookup icon next to the New Contact column. In the Lookup window, enter the First Name, Last Name, or email address, and click Go. If the application doesn't find the contact, click New to create the contact record. If you know the contact record exists, click Add to link it to this record. To open the Contact Detail page to update information about the contact, click the Name link. For more information about linking contacts to accounts, see Tracking Relationships Between Accounts and Contacts (on page 274).
Account Team	To allow this record to be visible to other employees, click Add Users. In the Account Team Add User window, select the employee's name and specify the access level. For more information on sharing records, see Sharing Records (Teams) (on page 146).
Account Partners	To link an account and track it as your partner with this account, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (on page 276).
Account Competitors	To link an account and track it as your competitor for this account, click Add. Then enter the required information in the Edit form, and save the record. For field descriptions, see Tracking Partners and Competitors of Accounts (on page 276).

To remove or delete a linked record

1. Select the account.

   For instructions on selecting accounts, see Finding Records (on page 74).
2. On the Account Detail page, scroll down to the appropriate section.
3. In the row whose link you want to remove or delete, choose Remove or Delete from the record-level menu.

- **Remove.** This disassociates the records without deleting either record.
- **Delete.** This deletes the linked record. A deleted record is moved to the Deleted Items page and is permanently removed from the database after 30 days.

Related Topics

See the following topics for related information:

- Attaching Files and URLs to Records (on page 163)
- Deleting and Restoring Records (on page 173)
- Tracking Assets (on page 278)

Linking Portfolio Accounts

This feature is specific to Oracle CRM On Demand Financial Services Edition.

You can link portfolio accounts to an account with a many-to-one relationship. In other words, you can link many portfolio accounts to one account, but each portfolio account can be linked to only one account.

Before you begin. The Portfolio related information is not shown on the Account Details page by default. To allow you to see this information, your company administrator must grant access to the Portfolio related information to your role. You or your company administrator must then add the Portfolio related information to your Account Details page layout. For more information on customizing your Detail page layouts, see Changing Your Detail Page Layout (on page 749).

To link a portfolio subaccount

1. Select the parent account.

   For information on selecting accounts, see Finding Records (on page 74).
2. On the Account Detail page, scroll to the Portfolio related information, and click New.
3. Complete the fields in the Portfolio Account Edit page that is launched.

   For more information about portfolio accounts, see Portfolio Account Fields (on page 659).
4. Save the record.

Specifying Parent Accounts

You can indicate account hierarchies, such as a company that is a subsidiary of another company, by specifying a parent-child relationship. First create the parent account and then select that account as the parent for the child or subaccount.

To specify the parent account

1. Select the child account.

   For instructions on selecting accounts, see Finding Records (on page 74).
2. On the Account Detail page, click Edit.

   NOTE: If the inline edit feature is enabled for your company, you can specify the parent account inline on the Account Detail page. For more information on inline editing, see Updating Record Details (on page 115).
3. On the Account Edit page, click the Lookup icon next to the Parent Account field.
4. In the Lookup window, select the parent account.
5. Save the record.

Related Topics

See the following topics for related information:

- Finding Records (on page 74)
- Account Fields (on page 284)

Limiting Account Records Displayed

You can limit the accounts you see by selecting a filtered list. A list shows a subset of the accounts that meet the criteria saved with the list.

Before you begin. When you create a list, you need to enter the fields and values for the criteria you set up. You might want to go to the Account Edit page and write down the exact field names and values as they are used in your application. Otherwise, your filtered list may not pick up the correct records. Alternatively, you can print the record Detail page to capture the exact field names; however, the printout does not capture the field values for drop-down lists.

To open a filtered list for accounts

1. Click the Accounts tab.
2. From the Account Lists section on the Account Homepage, select the list you want to work with.

   For a description of default account filtered lists, see Working with the Account Homepage (on page 266).

To create a filtered list for accounts

1. Click the Accounts tab.
2. From the Account Lists section on the Account Homepage, click the Manage Lists link.
3. On the Manage Lists page, click the New List button.
4. Complete the steps described in Creating and Refining Lists (on page 130).

Related Topics

See the following topics for related information:

- Account Fields (on page 284)
- Working with Activity Lists (on page 203)
- Working with the Account Homepage (on page 266)

Tracking Relationships Between Accounts

When you want to track relationships between accounts, store the information in the Account Relationship pages. For example, you might want to track investor or affiliate relationships for this account.

To do so, first link the account whose relationship you want to track to this account record. (You can link as many accounts as you want.) Then define the relationship and add any other pertinent information.

NOTE: The tracking relationship feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company. To enable your company to track relationships between accounts, the Manage Extended Contact and Account Relationship Access privilege must be included in your company administrator's role, and your company administrator must enable the Access Extended Account Relationship privilege for the users who will track relationships between accounts.

Company administrators can create custom fields to store additional information about account relationships and add those custom fields to the Account Relationship Edit page layout. Then, users who have access to the account relationship records can view and update the information in the custom fields.

Before you begin. Create an account record for each organization you want to link to the account. This feature might not be available in your version of the application.

To track relationships between accounts

1. Select the account.

   For instructions on selecting accounts, see Finding Records (on page 74).

2. On the Account Detail page, scroll down to the Account Relationships section and do one of the following:
   - To link an account, click Add.
   - To update information, click the Edit link in the row for the existing account relationship.

3. On the Account Relationship Edit page, enter the required information.

   The following table describes some field information for tracking relationships between accounts.

Field	Comments
Related Account	Click the Lookup icon, and select the account whose relationship and information you want to track. This is a required field.
Role	Select an option that defines the relationship between the accounts.
Reverse Role	Select an option that defines the reverse relationship between the accounts.
Start Date	You can use this field to record the start date of the relationship between the accounts. The default is today's date.
End Date	Use this field to record the expiration date of the relationship between the accounts.

4. Save the record.

Tracking Relationships Between Accounts and Contacts

You can link accounts to contacts in a number of ways. From an Account Detail page, you can link existing contacts to the account, and you can also create new contacts that are automatically linked to the account. Similarly, from a Contact Detail page, you can link existing accounts to the contact, and you can also create new accounts that are automatically linked to the contact.

About the Information for an Account Contact

After you link an account and a contact, you can view the details of the account contact in the Account Contact Edit page. Company administrators can create custom fields to store additional information about account contacts and add those custom fields to the Account Contact Edit page layout. Then, users who have access to the account contact records can view and update the information in the custom fields.

Company administrators create custom fields for account contacts through the Account Contact Fields link, which is available for both the Account and the Contact record types in the application customization pages of Oracle CRM On Demand. Company administrators create layouts for the Account Contact Edit page through the Account Contact Page Layout link, which is also available for both the Account and the Contact record types. For more information about adding custom fields and creating page layouts, see Application Customization (on page 1198).

About the Primary Contact for an Account

You can link multiple contacts to an account, but one of the linked contacts must be specified as the primary contact for the account. The first contact that is linked to an account is automatically specified as the primary contact for the account, but you can later specify a different primary contact for the account. For information about changing the primary contact for an account, see Changing an Account Primary Contact (on page 269).

The name of the primary contact is shown in the Primary Contact field on the Account Detail page, if that field is present in your Account Detail page layout. Also, in the Contacts related information section of the Account Detail page, if the Primary Contact check box is present in the layout, then the check box is selected in the row for the primary contact. Your administrator determines whether the Primary Contact field and the Primary Contact check box are present on the layouts.

In the Contacts related information section of the Account Detail page, the primary contact for the account always appears as the first contact in the list of contacts that are linked to the account, even if the Primary Contact check box is not shown in the Contacts related information section of the Account Detail page. If you click Show Full List to open the full list of linked contacts, then the primary contact might appear as the first record on the list page, even if you sort the list using a field such as Last Name or First Name.

The position of the primary contact in the list depends on how many records are in the list and the number of records that you display on your list page. For example, assume that you have a total of 180 contacts linked to an account, the last name of the primary contact for the account begins with the last letter of the alphabet, and you display 100 records on your list page. In that case, the primary contact appears as the first record in the second page of your list when you sort the list using the Last Name field.

About Contact Roles

When you link an account and a contact, you can specify the roles that the contact has at the account. Recording a contact's role at a company is critical to understanding the influence that the contact has on buying decisions at the account. For example, you might want to track the following contact relationships for an account: Approver, User and Evaluator, User and Approver, User and Decision Maker, Evaluator and Approver, Evaluator and Decision Maker, and Unknown.

The following procedure describes how to link contacts to an account.

To link contacts to an account

1. Select the account that you want.

   For information on selecting records, see Finding Records (on page 74).
2. To create a new contact that is linked to the account, do the following:
   a. On the Account Detail page, in the Contacts related information section, click New.
   b. On the Contact Edit page, enter the information for the new contact, and then save your changes.

      NOTE: Certain fields on the Contact Edit page might be automatically populated with values from the account record.
3. To link an existing contact to the account, do the following:
   a. On the Account Detail page, in the Contacts related information section, click Add.
   b. On the Contacts List page, click the Lookup icon, and select the contact that you want to link to the account.

      You can link up to five contacts to the account in the Contacts List page.
   c. (Optional) For each contact, select an option that defines the primary role of the contact at the account.

      NOTE: After you link a contact to the account, you can add additional roles for the contact at the account.
   d. Save your changes.

The following procedure describes how to link accounts to a contact.

To link accounts to a contact

1. Select the contact that you want.

   For information on selecting records, see Finding Records (on page 74).
2. To create a new account that is linked to the contact, do the following:
   a. On the Contact Detail page, in the Accounts related information section, click New.
   b. On the Account Edit page, enter the information for the new account, and then save your changes
3. To link an existing account to the contact, do the following:
   a. On the Contact Detail page, in the Accounts related information section, click Add.
   b. On the Add Account page, click the Lookup icon, and select the account that you want to link to the contact.

      You can link up to five accounts to the contact in the Add Account page.
   c. (Optional) For each account, select an option that defines the primary role of the contact at the account.

      NOTE: After you link an account to the contact, you can add additional roles for the contact at the account.
   d. Save your changes.

The following procedure describes how to view and update the details of an account contact.

To view and update the details of an account contact

1. Do one of the following:
   - On the Account Detail page, in the Contacts related information section, click the Edit link for the contact.
   - On the Contact Detail page, in the Accounts related information section, click the Edit link for the account.

   The Account Contact Edit page shows the details of the related contact. The fields in the page might be read-only, or you might be able to add and change information on the page, depending on how your company administrator sets up the page layout.
2. Update the information as required, and then save your changes.

The following procedure describes how update the role information for an account contact.

To update the role information for an account contact

1. Do one of the following:
   - On the Account Detail page, in the Contacts related information section, click the Edit Roles link for the contact.
   - On the Contact Detail page, in the Accounts related information section, click the Edit Roles link for the account.

   The Account Roles page or the Contact Roles page shows the available and selected roles for the account contact.
2. In the Account Roles page or the Contact Roles page, in the Available section, select the roles for the contact, and then use the directional arrow to move the roles to the Selected section.
3. Use the up arrow and down arrows to change the order of the roles in the Selected section.

   The role at the top of the list is the primary role.
4. Save your changes.

Tracking Partners and Competitors of Accounts

Oracle CRM On Demand provides areas in the application where you can track information on either partners or competitors for your accounts. For example, you might want to track which companies (accounts) you do business with for Account XYZ or which companies (accounts) you compete with for Account XYZ.

To do so, first link the account acting as your partner or competitor to the account record. You can link as many partner or competitor accounts as you want. Then add information, such as the strengths and weaknesses, about the partner or competitor to the Account Partner Edit or Account Competitor Edit page.

NOTE: When you add an account partner or account competitor, a reciprocal record is created under the selected account. For example, if you add Account 123 as an account partner of Account XYZ, you automatically see Account 123 listed in the Account Partner list for Account XYZ.

For information on converting existing accounts to partner accounts, see Converting Accounts to Partner Accounts (on page 422).

Before you begin. Create an account record for each partner or competitor you want to link to the account. For instructions on adding records, see Creating Records (on page 51).

To track partner and competitor information for accounts

1. Select the account.

   For instructions on selecting accounts, see Finding Records (on page 74).
2. On the Account Detail page, scroll down to the Account Partners or Account Competitors section, and do one of the following:
   - To link an account, click Add.
   - To update information, click the Edit link next to the existing partner or competitor.
3. On the Account Partner Edit or Account Competitor Edit page, enter the required information.

   The following table describes some field information for tracking partner or competitor information.

Field	Comments
Account Partner	Click the Lookup icon, and select the account whose relationship and information you want to track as your partner when dealing with this account. This is a required field.
Account Competitor	Click the Lookup icon, and select the account whose relationship and information you want to track as your competitor for this account. This is a required field.
Role	Select an option that defines the relationship between the accounts.
Reverse Role	Select an option that defines the reverse relationship between the accounts.
Start Date	You can use this field to record the start date of a partnership. The default is today's date. This is a required field.
End Date	You can use this field to record the expiration date of a partnership.
Primary Contact	The most important contact for the partner or competitor relationship.

4. Save the record.

Tracking Assets

When you want to track a product you've sold to a customer or company, link the product record to the account as an asset. You can also link a product to an opportunity as an asset.

This topic describes how to create an asset by linking a product to an account from the Account Detail page, or by linking a product to an opportunity from the Opportunity Detail page.

NOTE: You can also create assets from the Asset Homepage and from the Asset List and Detail pages. If you create an asset from the Asset Homepage or from an Asset List page or Detail page, and if you want to associate the asset with an account, then you must select the account in the Account field on the asset record. Similarly, if you create an asset from the Asset Homepage or from an Asset List page or Detail page, and if you want to associate the asset with an opportunity, then you must select the opportunity in the Opportunity field on the asset record. The Account and Opportunity fields do not appear on the Asset Edit page by default. Your administrator must add these fields to the page layout for the Asset record type for your role.

To link a product record to an account or opportunity as an asset

1. Select the account or opportunity.

   For instructions on selecting records, see Finding Records (on page 74).
2. On the Account Detail page or the Opportunity Detail page, scroll to the Assets section, and do one of the following:
   - To create an asset, click New.

     By default, the creator of the asset is the owner of the asset.
   - To update asset information, click the Edit link next to the existing asset.
3. On the Asset Edit page, enter the required information.

   NOTE: If you are using an industry-specific version of Oracle CRM On Demand, assets might be listed under different headings. For example, in Oracle CRM On Demand Automotive Edition, assets are listed as *vehicles*.

   The following table describes some fields for tracking asset information. If you are using an industry-specific version of Oracle CRM On Demand, you might see additional fields.

Field	Description
Key Asset Information	
Product Name	Product supplied to the customer. When you link the product record, these fields are copied from the product definition: Product Category, Part #, Type, and Status.
Serial #	The serial number for the asset. If a serial number is entered for the asset, then in asset lists and in other pages where the serial number of the asset appears, you can drill down from the serial number to open the asset record. If a serial number is not entered for the asset, then you cannot drill down to open the asset record from a list of assets, unless the Title field is displayed in the list. **NOTE:** If a serial number is entered in an asset record, then the serial number is used as the title of the asset. Otherwise, the product name is used. In the Recently Modified Assets section of the Asset Homepage, and in other pages where the asset title appears, you can drill down from the asset title to open the asset record.

Field	Description
Purchase Price	Price paid for the product.
Quantity	Number of units the customer purchased.
Ship Date	Defaults to today's date.
Product Category	Read-only. Copied from the product definition.
Part #	Read-only. Copied from the product definition.
Type	Read-only. Copied from the product definition.
Operating Status	Default values are Inactive, Active, Idle, Up, Limited Use, Maintenance, Down, Critical Down.
Warranty	Time period of the warranty.
Contract	Type of contract, such as Bronze, Gold, Platinum, or Silver.
Currency	Currency corresponding to the Purchase Price. You can select another currency to convert the price to another currency, if your company administrator set that feature up.
Notify Date	Date that appears in the task record. If you enter a Notify Date on the asset record, a task is created when you save this asset record. The task appears as "Asset Name requires follow-up" on My Homepage, and on either the Account or Opportunity Homepage, depending on whether you created the asset for an account or an opportunity. The task might also appear in the list of tasks on the Calendar tab, depending on which list is displayed there. **TIP:** Set the date to give you time for follow-up tasks regarding this asset, such as notification that a contract or warranty is about to expire. **NOTE:** The automatic creation of a task feature is activated only when you enter a notify date on an asset record that is linked to an account or opportunity.
Asset Type	The type of asset. **NOTE:** In the standard application, assets are included in the lists of portfolio accounts in Oracle CRM On Demand. However, if your administrator selects the Exclude Vehicle/Assets Records from Portfolio Accounts check box on the company profile, then only the assets that have a value of Portfolio in the Asset Type field are included in the lists of portfolio accounts.
Additional Information	

Field	Description
Description	Additional information about the asset. Limit of 250 characters.

Tracking Revenue Based on Accounts

Before you begin. This feature is specific to Oracle CRM On Demand Financial Services Edition.

You can track revenue information for each of your accounts, which allows your company to base its forecasts on account revenue. To do so, you add revenue records to accounts.

Adding revenue records to accounts allows you to:

- Track products, product categories, or revenues forecasted for each account
- Base your company's forecasts on account revenue

If your company bases its forecasts on accounts, only records meeting these criteria are included in the forecast:

- Revenue record for the account must have a Status of Open, Pending, or Closed.
- Revenue record for the account must have the Forecast field checked.
- Revenue record cannot be linked to an opportunity.

Before you begin. Your company needs to inform you of the forecasting method that it wants to use. Companies can forecast revenue for any of the following: opportunity revenue, opportunity product quantity and revenue, account revenue, or contact revenue. The company forecasting method determines which fields you need to fill in when adding revenue records to accounts.

To add revenue to accounts

1. Select the account.

   For instructions on selecting accounts, see Finding Records (on page 74).
2. On the Account Detail page, scroll down to the Revenues section and do one of the following:
   - To add a revenue record, click Add.
   - To update revenue information, click the Edit link next to the existing revenue record.
3. On the Revenue Edit page, complete the Revenue Fields.

   NOTE: If your company does not use account revenue for its forecasts, it is best to leave the Forecast check box blank on the Revenue page.
4. Save the record.

Revenue Fields

The following table describes field information for revenue. Your company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

NOTE: Account and Contact Revenue forecasting require that Revenues be enabled for both Accounts and Contacts. This functionality must be set up for your company. For more information, contact your company administrator.

CAUTION: If your company bases its forecasts on account or contact revenue, the information that you enter for revenue can affect its calculations.

Field	Description
Key Product Information	

Field	Description
Start/Close Date	For an account or contact, the expected revenue close date. For recurring revenue, the start date. For recurring revenue with a close date that ends on the last day of the month and a start date of mid-month, add one record for the full recurring price and another record for the prorated order. For example: You start supplying disposables to a company or client on May 15th. After that, you will be sending $500 worth of disposables at the end of each month through the end of the year. For the mid-month order, add a record with these values: Revenue = $250 Quantity = 1 For the recurring order, add a second record with these values: Revenue = $500 Quantity = 1 Frequency = Monthly #of Periods = 7 (June through December).
Product	Only products marked Orderable by your company administrator can be selected.
Product Category	Category of the product. This field is read-only by default, but your administrator can make the field editable. If this field is editable, and if your administrator enforces the relationship between products and their product category, then the product and the product category on the record must be associated with each other. In this case, the behavior is as follows: - If a product is already selected in the Product field, and if you select a product category that is not associated with the selected product, then you cannot save your changes. - If you select a product category before you select a product in the Product field, then when you click the Lookup icon in the Product field, a list of the products that are associated with the selected product category is displayed. Your administrator can enforce the relationship between products and their product category by selecting the Enforce Product Category-Product Relationship check box on the company profile.
Part #	Number carried over with the product definition. Read-only.
Forecast	Indicator to include this product in forecasting totals.
Type	Default values are Actual, Shipped, Billed, Booked, Projected, and Quota. **NOTE:** The Type you set applies to the revenue record. Another Type field (read-only field), which is populated with the product information, might also appear on this page.

Field	Description
Status	If your company calculates forecasts on accounts or contacts, you must set the Status to Open, Pending, or Closed for this record to be included in the forecasts. **NOTE:** The Status you set applies to the revenue record. Another Status field (read-only field), which is populated with the product information, might also appear on this page.
Quantity	Number of units the customer orders. For a recurring product, enter the quantity of the product per recurring period. For example, if you send 10 printer cartridges each month, enter 10 here.
Revenue	Quantity multiplied by Price. The revenue cannot be overwritten. If the Forecast check box is selected, this revenue amount contributes to your company's forecast totals. **TIP:** To forecast a specific revenue value, independent of the product or product category, set the quantity to 1 and the price equal to the revenue value.
Description	Additional information about the product. Limit of 16,350 characters.
Recurring Revenue Information	
Frequency	Indicates the frequency for a recurring product. The term *bi-weekly* means once every two weeks. When you populate this field, you must also populate the # of Periods field.
# of Periods	The number of periods for a recurring product. Recurring revenue can support a maximum of 260 periods. The length of time that is covered by the total number of periods varies based on the frequency selected (in the Frequency field). For example, if you have weekly recurring revenue, you can track revenue for up to five years. **NOTE:** When you populate this field, you must also populate the Frequency field.
Additional Information	
Owner	Person assigned to this revenue record. Generally, the owner can update record details or delete the record. However, access levels can be adjusted to restrict or expand a user's access. This value affects which records are included in reports you or your managers run in the Analytics pages. Each record has only one owner. However, account, contact, and opportunity records can be shared with other employees. For instructions, see Sharing Records (Teams) (on page 146).

Creating Appointments for Multiple Accounts

You can create an appointment for up to 25 accounts at one time by using the mass create appointment feature in Oracle CRM On Demand.

About Ownership of the Appointments

The Owner field for each appointment in the Account Mass Create Appointment page shows your name by default. You can select a different owner for each of the appointments, or clear the value from the Owner field, as necessary. The ownership of the appointments that you create is determined as follows:

- If the Activity record type is configured in user mode, then the user who is selected in the Owner field for an appointment in the Account Mass Create Appointment page becomes the owner of the appointment.

  NOTE: If you clear your name from the Owner field for an appointment in the Account Mass Create Appointment page and you do not select another user, then you become the owner of the appointment by default, unless the Owner ID field is set up as a required field for the Activity record type. If the Owner ID field is set up as a required field for the Activity record type, and if you leave the Owner field in the Account Mass Create Appointment page blank, then the appointment cannot be created.

- If the Activity record type is configured in mixed mode, then the Owner field for an appointment in the Account Mass Create Appointment page can be populated, or it can be blank, and the following happens:
  - If the field is populated, then the selected user becomes the owner of the appointment.
  - If the field is not populated, then the Owner field on the appointment is blank. However, the first time that the appointment is edited, the user who edits it might be prompted to populate either the Owner field or the Book field for the appointment, depending on how your administrator sets up these fields.
- If the Activity record type is configured in book mode, then the Owner field for an appointment in the Account Mass Create Appointment page must be blank, that is, you must clear the value from the field. In addition, for the appointment to be created successfully, at least one of the following conditions must be true:
  - A custom book is selected as the default book for the Activity record type on your user record.
  - A custom book is selected as the default book on your user record.

  After you create the appointment, the Owner field and the Book field on the appointment are both blank. However, the first time that the appointment is edited, the user who edits it is prompted to populate the Book field, as this is a required field when the Activity record type is configured in book mode.

Use the following procedure to create an appointment for multiple accounts at one time.

To create an appointment for multiple accounts at one time

1. If necessary, create a list of accounts or filter an existing list to show the accounts for which you want to create an appointment.
2. If there are more than 25 records in the list, then change the value in the Number of records displayed field at the bottom of the Account List page to 25.
3. On the Account List page, click Menu, and select Mass Create Appointment.
4. On the Account Mass Create Appointment page, update the information for each appointment as necessary.

   The fields in the Account Mass Create Appointment page show the following values when you open the page:
   - **Start Time.** The start time and date are set to 12:00 P.M. on today's date.
   - **End Time.** The end time and date are set to 60 minutes after the start time and date.
   - **Subject.** This field shows the word Appointment, followed by the name of the account.
   - **Owner.** This field shows your name.
   - **Account Name.** This field shows the name of the account.
5. Click Finish.

   NOTE: If an appointment cannot be created successfully for any one of the accounts listed in the Account Mass Create Appointment page, then none of the appointments are saved, and an error message is displayed.

6. If you want to create an appointment for additional accounts in the list, then display the next page of the list and repeat this procedure as necessary.

After you create the appointments, each appointment is available as a related item in the Open Activities related information section of the Detail page for the relevant account. You can edit the appointment to update the appointment details in the same way that you edit other appointments.

Analyzing Account Performance

The Account Analysis section of the Account Homepage displays an analysis of how accounts are distributed and the closed revenue. You can identify the top-performing customers and underperforming customers, as well as the new market segments.

In this section of the Account Homepage, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down lists to view the same data from another perspective.

Account Fields

Use the Account Edit page to add an account or update details for an existing account. The Account Edit page shows the complete set of fields for an account.

TIP: You can also edit accounts on the Account List page and the Account Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

Account records are central to how you manage and view your data. As a result, you should enter as much information about accounts as you can. Some of that information, such as Region or Industry, can be used in reports as a way to categorize information. Similarly, if you link a record, such as an opportunity, to an account record with Region or Industry filled in, those opportunities can be categorized by those values.

The following table provides additional information regarding some fields.

Field	Description
Key Account Information	
Account Name	Name of the account. To avoid duplicate records, make sure you follow the naming conventions your company has set up for abbreviations, capitalization, and so on.
Location	Type of facility operated by the account at this site, such as Headquarters.
Parent Account	Company that the account is a subsidiary of.
Web Site	URL address for the account.
Account Sales Information	

Field	Description
Account Type	Relationship of the account to your company, such as Prospect, Customer, Partner, or Competitor. **Note:** Accounts designated as a Partner or Competitor appear under the All Competitor and All Partner Accounts lists available from the Account Homepage. They are also included in the list of accounts you can link to other accounts or opportunities from the Account or Opportunity Detail page. At that point, you can define the exact role that the account plays, such as Reseller, Vendor, or Partner, and track the partner and competitor information for every account and opportunity.
Priority	Priority for the account, such as High, Medium, or Low.
Industry	Type of business engaged in by the account, such as Manufacturing, High Technology, Financial Services, Retail, Automotive, Pharmaceuticals, Telecommunications, Energy, Services, or Other. If you want to view report information, such as opportunities, by Industry, select an Industry for the account and then link the opportunity record to the account.
Public Company	Indication that the account is a publicly-owned company.
Region	Region the account falls under at your company. If you want to view report information, such as opportunities, by Regions, select a Region for the account and then link the opportunity record to the account.
Status	The status of the account. You can use this field to record a status for the account. A number of sample values are provided by default, but your company administrator can add or change values to meet your company’s business needs.
Last Call Date	This field is specific to Oracle CRM On Demand Life Sciences Edition.
HIN	Health Industry Number. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Influence Type	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Call Frequency	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Source Campaign	The campaign that generated the account. If the account is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the account is created by a user, the user can enter the information in this field.
Annual Revenues	Amount of the company's annual revenue.
Market Segment	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Market Potential	This field is specific to Oracle CRM On Demand Life Sciences Edition.

Field	Description
YTD Revenue	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Market Share	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Reference	Indication that the account can be used as a reference for potential customers or sales representatives to contact.
Reference as of	Date the account becomes a reference.
Account Partner	Indication that this account is a partner.
Number of Physicians	Number of physicians working at a health care site, such as a hospital or clinic. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Route	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Additional Information	
Billing and Shipping Addresses	Selecting a country determines the labels for the remaining address fields, according to that country's address convention. You might see the screen refresh to adjust the field names. If you add a contact and link it to this account, the Billing address for the account is carried over to the Account address section for that contact. **NOTE:** If shared addresses are set up for your company, the billing and shipping addresses are read-only, and the address fields change to meet the requirements for shared addresses. For more information on shared addresses, see Addresses.
Owner	The alias of the owner of the account record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. To reassign ownership of an account record, you must have the Read/Edit access level setting for the record. **NOTE:** If group ownership is enabled for your company, then the group team members automatically change if the new owner of the account is a member of a different group. The value in the Owner field affects which records are included in the reports that you or your managers run. You can share account records with other users through the Account Team page. For information about sharing records with other users, see Sharing Records (Teams) (on page 146). Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Field	Description
Reassign Account	Indicates that the account should be reassigned. If your company administrator has set up account assignment rules, selecting this field triggers the assignment manager in Oracle CRM On Demand to process the account again and assign it according to the rules. The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47). **NOTE:** The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and the current system load. In the case of accounts, the processing time is also affected by the number of team members and the number of contacts and opportunities associated with the record. The owner name changes when the record is reassigned.
Territory	Territory that this account belongs to.
Description	Additional information about the account. This field has a limit of 16,350 characters.

Related Topics

See the following topic for related information:

- Managing Accounts (on page 267)

Contacts

Use the Contact pages to create, update, and track contacts. *Contacts* are individuals that your company currently conducts business with or expects to conduct business with in the future. These individuals can be employees of other companies, independent consultants, vendors, or personal acquaintances. A contact is generally associated with an account, and often, an account record includes links to information about several different contacts at that company.

Within Oracle CRM On Demand Financial Services Edition, a contact is often designated as a client to support functionality that is specific to Oracle CRM On Demand Financial Services Edition. Designating a contact as a client indicates that this is a contact with whom your company maintains a long-term relationship so that you can monitor changes in the client's situation and identify opportunities to cross-sell additional products to the client.

Related Topics

See the following topic for related information:

- Managing Contacts (on page 289)

Working with the Contacts Homepage

The Contacts Homepage is the starting point for managing contacts.

NOTE: Your company administrator can customize the layout of your Contacts Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Contact

You can create a contact by clicking the New button in the My Recently Viewed Contacts section. For more information, see Creating Records (on page 51) and Contact Fields (on page 305).

Working with Contact Lists

The Contact Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for contacts.

Contact List	Filters
All Contacts	No filter is available. This list displays all records to which you have visibility, regardless of the owner.
All Customer Contacts	Contacts where the Type field is set to Customer
Favorite Contacts	This list displays all of the contact records that you added to your favorite records. For information about the Favorite Contacts list, see About the Favorite Contacts List (on page 297).
My Contacts	Contacts with your user name in the Owner field
My Recently Created Contacts	Contacts with your user name in the Owner field, sorted by the created date
My Recently Modified Contacts	Contacts with your user name in the Owner field, sorted by the modified date
Recently Created Contacts	All contacts, sorted by the created date
Recently Modified Contacts	All contacts, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Contacts

The My Recently Viewed Contacts section shows the contacts that you viewed most recently.

Viewing Favorite Contacts

The Favorite Contacts section shows the names of a maximum of 10 contacts that you added to your favorite records. The order of the contacts in the Favorite Contacts section is determined by the date on which you added the contacts to your favorite records, and not by the date on which the contact records were created. The contacts are listed in descending order by date, with the contact that you most recently added to your favorite records appearing at the top of the list. From the Favorite Contacts section, you can open the full list of your favorite contacts by clicking Show Full List. For information about the Favorite Contacts list, see About the Favorite Contacts List (on page 297).

Working with Contact Tasks

The My Open Contact Related Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date and priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values (on page 1254).

- To review a task, click the Subject link.
- To review the contact with which the task is associated, click the contact name.
- To expand the list of tasks, click Show Full List.

Using Reports to Analyze Contacts

One or more report sections might be shown on your Contacts Homepage (your company administrator can specify which report sections are shown on the page). In the standard edition of Oracle CRM On Demand, the Contact Analysis by Account section is shown, which displays contacts by account criteria, such as Region, State/ Province, or Industry. For information about using the Contact Analysis by Account section, see Analyzing Contacts (on page 301).

Adding Sections to Your Contacts Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Contacts Homepage, depending on which sections your company administrator has made available for display on your Contacts Homepage.

To add sections to your Contacts Homepage

1. On the Contacts Homepage, click Edit Layout.
2. On the Contacts Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Contacts

To manage contacts, perform the following tasks:

- Importing Your Contacts (on page 291)
- Importing vCard Files (on page 296)
- Saving Contacts as vCard Files (on page 296)
- Linking Contacts to Multiple Accounts (on page 298)
- Tracking Relationships Between Contacts (on page 298)
- Tracking Relationships Between Accounts and Contacts (on page 274)
- Tracking Revenue Based on Contacts (on page 299)

NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Adding Referrals (on page 300)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Tracking Contact Interests (on page 300)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Analyzing Contacts (on page 301)
- Tracking the Best Calling Times (on page 301)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Adding Contact State Licenses (on page 302)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Tracking Visits (Sales Calls) to Customers (on page 208)

  NOTE: This feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

- Blocking Contacts (on page 303)
- Sending Marketing Emails Using Oracle Eloqua Engage (on page 303)

If your user role includes the Maps Integration privilege, then you can also perform this procedure, Performing Proximity Searches (on page 364).

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Sharing Records (Teams) (on page 146)
- Using Assessment Scripts (on page 168)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- About the Favorite Contacts List (on page 297)
- Displaying Images on Record Detail Pages (on page 70)

Importing Your Contacts

As a nonadministrator, you can import up to 2000 contacts at a time from a comma-separated value (.csv) file to use with Oracle CRM On Demand.

When you import contacts, you specify how you want Oracle CRM On Demand to handle duplicate records.

Several utilities are available from the Import and Export Tools page, which augment the import and export facilities in Oracle CRM On Demand:

- **Import Assistant.** For more information, see Import Assistant (on page 1827).
- **Oracle Data Loader On Demand.** For more information, see Oracle Data Loader On Demand Client Utility (on page 1838).
- **Oracle Migration Tool On Demand.** For more information, see Oracle Migration Tool On Demand Client Utility (on page 1843).
- **Oracle Web Services.** For more information, see Web Services Integration (on page 1838).

For more information about choosing an appropriate import method, see 1801156.1 (Article ID) on My Oracle Support. For more information on importing and exporting in Oracle CRM On Demand, see Import and Export Tools (on page 1610).

You can also import individual contacts by importing vCard files. For more information, see About vCard Files (on page 294).

NOTE: Company administrators can import up to 30,000 contact records at one time, with a maximum file size of 20 MB.

Before you begin:

- If several employees at your company are importing contacts, coordinate the importing effort to minimize record duplication.
- Prepare your file for importing to make sure you capture all the data in the file. At a minimum, your data file must include all required fields. Also, your administrator can configure a field so that it is conditionally required, that is, the field is not required by default, but becomes required if the data in other fields on the record meets certain criteria. If a field becomes required as a result of the condition defined for the field being true, and if your import file does not include a value for the conditionally required field, then the record is rejected. To determine if there are any conditionally required fields configured for the Contact record type, contact your administrator.

CAUTION: You cannot undo the importing of records or perform a mass deletion of records. Therefore, practice the importing procedure with a file of 5-10 records to avoid cleaning up data afterwards. If your company is importing a large number of records, attend a training session on importing data. For information on those resources, click the Training and Support global link at the top of each page in Oracle CRM On Demand.

To import your contacts

1. Click the Contacts tab.
2. In the Recently Modified Contacts title bar, click Import.

   NOTE: If the Recently Modified Contacts section is not visible on your Contacts Homepage, click the Edit Layout link in the upper right corner of the page, and add the Recently Modified Contacts section to your page layout.
3. On the Data and Integration Tools page, in the Personal Import and Export Tools section, click Import Your Contacts.

   This starts the import assistant.
4. In Step 1 of the import assistant:

a. Select how you want the import assistant to identify matching records.

   The import assistant uses an external unique ID, which is a unique external ID field that is imported from another system. The import assistant also uses Oracle CRM On Demand predefined fields.

   For information on how duplicate records are defined, see About Record Duplicates and External IDs (on page 1635).

b. Select what you want the import assistant to do if it finds a duplicate unique record identifier in Oracle CRM On Demand. Your choices are: not to import duplicate records, to overwrite existing records, or to create additional records.

c. Select the action you want the import assistant to follow if the imported record's unique record identifier does not match an existing record in Oracle CRM On Demand.

   NOTE: If you select Overwrite Records and Don't Create New Record in the previous option, this results in the record being updated.

d. Decide if the import assistant should create a new record for missing associations (related records) in your data file.

e. Select the date/time format used in the CSV file.

   For more information, see Field Type Guidelines for Importing Data (on page 1651).

f. Verify that the file encoding selection is Western.

   NOTE: Do not change this setting unless you are certain another encoding method is used. The default, Western, applies to most encoding systems in Europe and North America.

g. In the Error Logging drop-down list, select what you want Oracle CRM On Demand to log: All messages, Errors and Warnings, or Errors Only.

h. Select the type of CSV delimiter used in your file: comma or semi-colon.

i. Select the Data file records need to be processed sequentially check box if required.

   NOTE: Choosing to process data files sequentially ensures that when an import request is submitted, the child import requests are always processed in sequence. It also ensures that CSV file dependencies are maintained.

j. Select the Enable Email Notification check box if you want an email notification to be sent after the import process is complete. This check box is selected by default.

5. In Step 2 of the import assistant:

   a. Follow the instructions for validating your file, if necessary.

   b. Select a field mapping file, if available.

      Field mapping files (.map) contain the pairing of fields in your CSV file with existing Oracle CRM On Demand fields. After you perform an import, the system sends you an email containing the .map file with the recent mapping scheme. Save it to your computer to re-use it during later imports.

6. In Step 3 of the import assistant, map the fields in your file to Oracle CRM On Demand fields. At a minimum, you must map all required fields to the column headings in the CSV file.

   The import assistant lists the column headings from your import CSV file next to a list showing all the fields in that area in Oracle CRM On Demand, including the custom fields that you added.

   If the address field you need does not appear in the drop-down list, select the corresponding one shown in this table.

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code
MEX State BRA State Parish Part of Territory Island Prefecture Region Emirate Oblast	Province
Island Code Boite Postale Codigo Postal	Zip/Post Code

If you selected a .map file, verify that the fields map correctly. Custom fields created since you ran the previous import might need to be mapped.

For information about external IDs, see About Record Duplicates and External IDs (on page 1635).

CAUTION: If you have selected the wrong file to import, click Cancel to change selections. At this point, using the Back button does not clear the cache, so the import file you originally selected appears in the field mapping step.

CAUTION: External Unique ID and Manager External ID are key fields that are used to associate Contacts with their Manager Records. If these fields are not mapped, the Manager Record will be associated with Contacts using the Contact Name and Manager fields. When using the Contact Name and Manager fields to do this association, the data file records will be subject to more stringent dependency ordering.

7. In Step 4 of the import assistant, follow the onscreen instructions, if necessary.
8. In Step 5 of the import assistant, click Finish.

To view the queue for your import requests

1. Click the Contacts tab.

2. In the Recently Modified Contacts title bar, click the Import button.
3. On the Data and Integration Tools page, click the Import Request Queue link.

   The Import Request Queue page appears with information about your requests, including the estimated time of completion.

   The following table describes the import status.

Status	Description
Completed	The import completed with no errors during import.
Completed with Errors	The import completed but there were some errors with some of the records.
Failed	The import completed but none of the records were imported.
Error	The import did not complete because an error occurred.

The following table describes the import record information.

Import Record Information	Description
# Submitted	The number of records contained in the CSV file.
# Processed	The number of records the import engine has currently processed. This field is processed every 20 seconds, or as set by a system process.
# Successfully Imported	The number of records that were imported without any problems.
# Partially Imported	The number of records that were imported. Not all records were imported.
# Not imported	The number of records that were not imported at all.

About vCard Files

A *vCard* is a virtual business card that allows users to exchange contact information, such as name, address, phone number, email address, Web site addresses, and photographs. vCard files are often attached to email messages, allowing recipients to quickly add new contact information to a personal address book. The file extension for a vCard file is .vcf.

In Oracle CRM On Demand, you can do the following:

- Import a vCard file and save the information from the file as a new contact record. For more information, see Importing vCard Files (on page 296).
- Save an existing contact record in Oracle CRM On Demand as a vCard file. For more information, see Saving Contacts as vCard Files (on page 296).

When you import a vCard file into Oracle CRM On Demand, or when you save an Oracle CRM On Demand contact record as a vCard file, certain information in the contact details is mapped so that it displays correctly in both the vCard and in the Oracle CRM On Demand Contact Detail page.

The following table shows the mappings between the fields in the Contact record type in Oracle CRM On Demand and the vCard properties.

Oracle CRM On Demand Contact Field	vCard Property	vCard Property Parameters
Last Name First Name Middle Name Mr./Ms.	N	None
First Name Last Name	FN	None
Work Phone #	TEL	TYPE=voice,work
Home Phone #	TEL	TYPE=voice,home
Cellular Phone #	TEL	TYPE=cell
Work Fax #	TEL	TYPE=fax,work
Email	EMAIL	TYPE=internet
Job Title	TITLE	None
Contact Address Fields	ADR	TYPE=work
Contact Photo	PHOTO	TYPE;ENCODING
Account Name and Department	ORG	None
Description	NOTE	None
Manager	X-MS-MANAGER	None
Assistant Name	X-MS-ASSISTANT	None

Considerations When Importing vCard Files in Oracle CRM On Demand

The following considerations apply when you import vCard files to Oracle CRM On Demand:

- If the value in a vCard property exceeds the field length that Oracle CRM On Demand supports, then the value is truncated in the contact record in Oracle CRM On Demand. For more information on Oracle CRM On Demand field lengths, see Field Type Guidelines for Importing Data (on page 1651).

- You can import only the vCard properties that Oracle CRM On Demand supports.
- If your vCard file contains more than one contact, then only the first contact in the vCard file is imported into Oracle CRM On Demand.
- You cannot import a Contact image into Oracle CRM On Demand using vCard files.
- If the corresponding Contact Detail field for a vCard property is read-only in Oracle CRM On Demand, then you cannot import the vCard property.
- If shared addresses are set up for your company, then the address fields are read-only in Oracle CRM On Demand, and the address properties in the vCard file are not imported into Oracle CRM On Demand.
- A vCard file property can be imported only if the corresponding field is part of the page layout in Oracle CRM On Demand.
- You can import only files with the .vcf file extension into Oracle CRM On Demand.

Related Topics

See the following topics for related information:

- About vCard Files (on page 294)
- Importing vCard Files (on page 296)
- Saving Contacts as vCard Files (on page 296)

Importing vCard Files

This topic describes how to import a contact into Oracle CRM On Demand by importing a vCard file from your computer.

NOTE: You can import files only with the .vcf file extension into Oracle CRM On Demand.

To import a vCard file

1. In the Contact Homepage or in any Contact Detail or List page, click Import vCard.
2. In the Import VCard page, click Browse to locate the vCard file that you want to import into Oracle CRM On Demand, and then select it.
3. Click Import vCard.

   A new Contact Detail page opens containing the contact details from the vCard file.
4. Click Save.

Related Topics

See the following topics for related information:

- About vCard Files (on page 294)
- Considerations When Importing vCard Files in Oracle CRM On Demand (on page 295)
- Saving Contacts as vCard Files (on page 296)

Saving Contacts as vCard Files

This topic describes how to save a contact from Oracle CRM On Demand as a vCard file.

To save a contact as a vCard file

1. Select the contact that you want to save as a vCard file.

   For information on selecting contacts, see Finding Records (on page 74).
2. In the Contact Detail page, click the Save as vCard button on the title bar.

Depending on your browser settings, you might be asked to specify the location where you want to save the vCard file.

Related Topics

See the following topics for related information:

- About vCard Files (on page 294)
- Considerations When Importing vCard Files in Oracle CRM On Demand (on page 295)
- Importing vCard Files (on page 296)

About the Favorite Contacts List

The Favorite Contacts list is a subset of your Favorite Records list. It shows only the contact records that you add to your favorite records. Depending on your company setup and your role setup, the Favorite Contacts list might be available in the following places in Oracle CRM On Demand:

- The Contact Lists section of the Contacts Homepage.

  NOTE: If the Favorite Contacts list is not available by default in the Contact Lists section of the Contacts Homepage, then you might be able to add it to the set of lists that appears in the Contact Lists section. For information about changing sets of lists, see Changing Sets of Lists for Record Types (on page 142).

- The set of lists in Lookup windows where you search for contacts.
- The Favorite Contacts section of the Contacts Homepage or My Homepage.

  The Favorite Contacts section shows the names of a maximum of 10 contacts that you added to your favorite records. The order of the contacts in the Favorite Contacts section is determined by the date on which you added the contacts to your favorite records, and not by the date on which the contact records were created. The contacts are listed in descending order by date, with the contact that you most recently added to your favorite records appearing at the top of the list. From the Favorite Contacts section, you can open the full list of your favorite contacts by clicking Show Full List.

  NOTE: Your administrator determines whether the Favorite Contacts section is available to be displayed on the Contacts Homepage or on My Homepage, or on both. If the Favorite Contacts section is not already displayed on the Contacts Homepage or on My Homepage, then you might be able to add it to the Homepage. For information about personalizing your Homepages, see Changing Your Homepage Layouts (on page 758).

When you open the Favorite Contacts list in the Favorite Contacts list page, the list shows the names of your favorite contacts and the dates on which you added the contacts to your favorite records. By default, the list is sorted according to the date on which you added the contacts to your favorite records, with the contact that you most recently added to your favorite records at the top of the list. You can change the sort order of the list and search for records in the list, but you cannot display additional fields in the list or add additional fields as criteria for the list filter.

Any contact that you add to your favorite records appears in your Favorite Records list as well as your Favorite Contacts list. You can have a maximum of 100 records in your Favorite Records list. If there are already 100 records in your Favorite Records list, and if you add another record to your favorite records, then the record that has been in your Favorite Records list for the longest time is dropped from the list to allow the new record to be added. If the record that is dropped from your Favorite Records list is a contact, then that contact no longer appears in your Favorite Records list or in your Favorite Contacts list, even if your Favorite Contacts list contains fewer than 100 records.

The following table describes the tasks that you can perform in the Favorite Contacts list page.

To do this	Follow these steps
Add a new contact	Click New. **NOTE:** When you create a contact from the Favorite Contacts page, the new contact is not automatically added to your Favorite Contacts list. If you want to add the new contact to your Favorite Contacts list, then you must click the Add to Favorites icon in the Detail page for the new contact.
Filter the list	Use the Alpha Search controls and the Quick Filter fields to filter the list to help you find the record you want. For information about using the Alpha Search controls and the Quick Filter fields, see Filtering Lists (on page 136).
Sort the Favorite Contacts list	Click a column heading in the list. By default, the list is sorted according to the date on which you added the contacts to your favorite records, with the contact that you most recently added to your favorite records at the top of the list.
Remove a record from the Favorite Contacts list	In the row for the record that you want to remove, click the Remove link. When you remove a contact from your Favorite Contacts list, the contact is also removed from your Favorite Records list, but the contact is not deleted from Oracle CRM On Demand.
Display details of a favorite contact	Click the name of the contact to display the Contact Detail page for that contact.
Change the set of lists that appears on the record Homepage and in picklists of lists.	For information about changing sets of lists, see Changing Sets of Lists for Record Types (on page 142).

Linking Contacts to Multiple Accounts

You can link a contact to more than one account. To do this task, your Contact Detail Page layout must include the Accounts related information. For information about changing your page layout, see Changing Your Detail Page Layout (on page 749).

For more information about linking records, see Linking Records to Your Selected Record (on page 117).

Tracking Relationships Between Contacts

When you want to track relationships between contacts, store the information in the Contact Relationship pages. For example, you might want to track influential relationships, such as personal relationships, business relationships, and industry peers for this contact.

To do so, first link the contact whose relationship you want to track to this contact record. (You can link as many contacts as you want.) Then define the relationship and add any other pertinent information.

NOTE: The tracking relationships feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: Company administrators can create custom fields to store additional information about contact relationships and add those custom fields to the Contact Relationship Edit page layout. Then, users who have access to the contact relationship record can view and update the information in the custom fields.

Before you begin. Create a contact record for each person you want to link to the contact.

To track relationships between contacts

1 Select the contact.

For instructions on selecting contacts, see Finding Records (on page 74).

2 On the Contact Detail page, scroll down to the Contact Relationships section and do one of the following:

- To link a contact, click Add.
- To update information, click the Edit link in the row for the existing contact relationship.

3 On the Contact Relationship Edit page, enter the required information.

The following table describes some fields for tracking relationships between contacts.

Field	Comments
Related Contact	Click the Lookup icon, and select the contact whose relationship and information you want to track. This is a required field.
Role	Select an option that defines the relationship between the contacts. The default values are: None Specified, Child, Lawyer, Spouse, Accountant, Assistant, Investor, Banker, Lived with, Subordinate, Superior, Known Associate, Competitor, Relative, or Agent. Your company administrator can change or add values to the drop-down list.
Reverse Role	Select an option that defines the reverse relationship between the contacts. The default values are: None Specified, Child, Lawyer, Spouse, Accountant, Assistant, Investor, Banker, Lived with, Subordinate, Superior, Known Associate, Competitor, Relative, or Agent. Your company administrator can change or add values to the drop-down list.
Start Date	The default is today's date. You can use this field to record the start date of the relationship between the contacts.
End Date	Use this field to record the expiration date of the relationship between the contacts.

Tracking Revenue Based on Contacts

You can track revenue information for each of your contacts, which allows your company to base its forecasts on contact revenue. To do so, you add revenue records to contacts.

NOTE: The revenue tracking feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

Adding revenue records to contacts allows you to:

- Track products, product categories, or revenues forecasted for each contact
- Base your company's forecasts on contact revenue

If your company bases its forecasts on contacts, only records meeting these criteria are included in the forecast:

- Revenue record for the contact must have a Status of Open, Pending, or Closed.
- Revenue record for the contact must have the Forecast field checked.
- Revenue record cannot be linked to an opportunity.

Before you begin. Your company needs to inform you of the forecasting method that it wants to use. Companies can forecast revenue on opportunity, opportunity product, account, contact revenue, or product quantity, but only on one of those. The company forecasting method determines which fields you need to fill in when adding revenue records to contacts.

To add revenue to contacts

1 Select the contact.

For instructions on selecting contacts, see Finding Records (on page 74).

2 On the Contact Detail page, scroll down to the Revenues section and do one of the following:
   - To link a revenue record, click Add.
   - To update revenue information, click the Edit link next to the existing revenue record.

3 On the Revenue Edit page, complete the Revenue Fields, see Tracking Revenue Based on Accounts (on page 280).

NOTE: If your company does not use contact revenue for its forecasts, it is best to leave the Forecast check box blank on the Revenue page.

4 Save the record.

Adding Referrals

You can add referrals to your contact record. When you create a new referral, the record is saved as a new lead record.

NOTE: The referrals feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

To add a referral

1 Select the contact.

For instructions on selecting contacts, see Finding Records (on page 74).

2 On the Contact Detail page, scroll down to the Referral section and click New.

3 On the Referral Edit page, enter the required information.

4 Save the record.

The new referral shows a status of Qualifying by default.

Tracking Contact Interests

You can track products, services, or hobbies a contact is interested in, such as mutual funds or golf.

NOTE: The contact interests feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

To track contact interests

1 Select the contact.

For instructions on selecting contacts, see Finding Records (on page 74).

2 On the Contact Detail page, scroll down to the Contact Interests section and click Add.
3 On the Contact Interests page, fill in the required information.
4 Save the record.

Analyzing Contacts

The Contact Analysis by Account section of the Contacts Homepage shows a chart that allows users to analyze their total number of contacts by account criteria, such as Region, State/Province, or Industry. With this information, users can see their contact distribution and identify areas of opportunity or weakness.

In this section of the Contacts Homepage, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down list to view the same data from another perspective.

Tracking the Best Calling Times

To record and track the best time to call on a contact (typically, a physician or another health care provider), complete the following procedure to add the best calling time. Creating this record allows you to track when a contact is available at a given address.

A contact record can contain zero or more best times to call, and it can have many addresses, each of which might contain zero or more best times to call. A contact call must have at least one address selected, and the information about the best times to call must be available for display to the sales representative for that contact at the selected address.

NOTE: You might need to add the Contact Best Times section to your Contact Detail page or Contact Call Detail page. For information about personalizing Detail page layouts, see Changing Your Detail Page Layout (on page 749). If the Contact Best Times section is not available to add to your page layout, then contact your company administrator.

NOTE: The Contact Best Times feature is available only in Oracle CRM On Demand Life Sciences Edition.

To track the best calling time

1 From the Contact Detail page, scroll to the Contact Best Times section, and click New.
2 Complete the fields described in the following table.

Field	Description
Day	The planned day of the call, for example, Monday. Use the picklist to select a day. (Required)
Start Time	The planned start time for the call, for example, 11:00 a.m. (Required)
End Time	The planned end time for the call, for example, 1:00 p.m. or 13:00. (Required)
Comments	A description of the call.
Address	The address of the contact. Use the Lookup selector to choose the address. (Required)

3 Save the record.

When you create the best call time for the contact, Oracle CRM On Demand also adds the call time to the Contact Best Times section in the Contact Call Detail page for the contact. You can track, but not create, a best call time record from the Contact Call Detail page.

4 To update the fields for the best call time, click Edit for the best call time record in the Contact Detail page.

You can view the best call time details by clicking the Day field on any record in the Contact Best Times section on the Contact Detail page.

Adding Contact State Licenses

A license to practice medicine is used to validate signatures for samples that are dropped off by a sales representative (for example, a pharmaceutical sales representative) to a contact (for example, a physician). A physician must have a valid medical license for the state in which the physician practices medicine. A *contact state license record* captures the license information for the contact, typically a physician.

To add a state license record for a contact, complete the following procedure.

NOTE: If you do not see the Contact State License related item section in your Contact Detail page, add that related item section as described in Customizing Related Item Layouts (on page 1258), or contact your company administrator. This feature is available in Oracle CRM On Demand Life Sciences Edition only.

To add a contact state license

1 From the Contact Detail page, scroll to the Contact State License section, and click New.

2 Complete the fields in the following table and save the record.

Field	Description
Contact	The contact for this state license record, typically a physician or pharmaceutical representative. Use the Book selector to choose a contact.
License Number	The license number for the contact, for example, PS4231732. (Required.)
State	The U.S. state or jurisdiction associated with the license number. Use the picklist list to select the state, for example, *NJ* for New Jersey. **NOTE:** If your jurisdiction is non-U.S., this field is not required.
Expiration Date	The date when the license expires (MM/DD/YYYY), for example, 10/31/2009. Click the calendar icon to select the expiration date.
Status	The status of the license (Active or Inactive). Choose the status using the picklist.

About Blocked Contacts

If your company wants to prevent a contact from receiving any information, samples, or promotional items for all products, then your company administrator can block the contact. When a contact is blocked, you receive an error message when you try to perform any of the following actions:

- Create a new contact call for the contact
- Submit an existing contact call record for the contact

  A contact call might be planned or in progress before the contact is blocked. If the contact is blocked before the contact call is submitted, then you cannot submit the contact call.
- Add the contact as an attendee for an account call
- Submit an existing account call record if the blocked contact is the primary contact for the account call

An account call might be planned or in progress before the primary contact for the call is blocked. If the primary contact is blocked before the account call is submitted, then you can submit the account call record only if you specify an alternative primary contact, who is not blocked, for the call.

For information about blocking contacts, see Blocking Contacts (on page 303).

Blocking Contacts

You block a contact by selecting a value in the Blocked Reason Code field on the contact record. The following values are provided for the field by default, but your company can add custom values for the field:

- **Business.** The contact is blocked from receiving product information and product samples because of a high-level business decision.
- **Do Not See.** The contact is blocked from receiving product information and product samples because of a business decision that restricts the contact's visibility into all product sets.
- **Do Not Ship.** The contact is blocked from receiving product information and product samples because of a business decision that does not allow any product to be shipped to the physician.
- **HR.** The contact is blocked from receiving product information and product samples because of a Human Resources decision that does not allow any product to be shared with the physician.
- **Legal.** The contact is blocked from receiving product information and product samples because of a legal review of the contact.

For information about adding custom values to a field, see Creating and Editing Fields (on page 1219). For information about what happens when a contact is blocked, see About Blocked Contacts (on page 302).

Before you begin. The Blocked Reason Code field must be present on the Contact Detail page layout for your role. For information about adding fields to page layouts, see Customizing Static Page Layouts (on page 1267) and Specifying Dynamic Page Layouts (on page 1314).

To block a contact

1. Select the contact that you want to block.

   For information about selecting records, see Finding Records (on page 74).
2. On the Contact Detail page, click Edit.
3. On the Contact Edit page, in the Blocked Reason Code field, select the appropriate code.
4. Save your changes.

About Blocked Products for Contacts

This feature is specific to Oracle CRM On Demand Life Sciences Edition. Your company administrator can specify that a contact is blocked from receiving information, samples, or promotional items for one or more products. You can view the products that are blocked for a contact in a read-only list in the Blocked Products related information section of the Contact Detail page. You cannot add, update, remove, or delete blocked product records in the Blocked Products related information section of the Contact Detail page.

NOTE: If the Blocked Products related information section is not visible on your Contact Detail page, then click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.

For more information about blocking products for contacts, see Blocked Products (on page 643).

Sending Marketing Emails Using Oracle Eloqua Engage

As a sales representative, you can send marketing emails to your customer contacts and leads, both individually or in lists, using Oracle Eloqua Marketing Cloud Service and its add-on product, Oracle Eloqua Engage. Because the email is sent through Oracle Eloqua Engage, you can track the email and use it in lead scoring and qualification, and to see whether the recipient has opened the email. For information on Oracle Eloqua Engage, see the Oracle Eloqua Marketing Cloud Service Web site.

NOTE: Your company must purchase the required licenses to use Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage. Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage are both separately licensed products from Oracle CRM On Demand.

Oracle CRM On Demand does not send any email addresses to Oracle Eloqua Engage for any contact or lead that has the Never Email check box selected on the Contact or Lead Detail page. Any new contact or lead that you create in Oracle CRM On Demand can receive a marketing email from Oracle Eloqua Engage after it is synchronized with Oracle Eloqua Marketing Cloud Service. Oracle Eloqua Engage respects any opt-out settings that you have applied for the contact or lead, such as unsubscribing a contact from receiving marketing emails or similar communications. The contact or lead receives email communications only if you have cleared the Never Email setting in Oracle CRM On Demand and that contact or lead has opted in or subscribed to email communications as recorded in Oracle Eloqua Marketing Cloud Service.

Limitations on the Number of Emails You Can Send From a List

There are limits to the number of emails that you can send at one time. When Oracle CRM On Demand sends emails from a list, the number of emails that it sends is limited to the number of records displayed on the current page you are viewing in Oracle CRM On Demand. If your list is set to display 25 rows but there are 100 records in the entire list, then when you click Send Email via Engage, Oracle CRM On Demand sends 25 records as that is what is displayed on the current page. In addition, browsers limit the length of the parameter that Oracle CRM On Demand can pass to Oracle Eloqua Engage in the URL to 2048 characters. If the list of addresses in the URL contains exceeds 2048 characters, you receive an error message asking you to reduce the number of records in the list. For the Microsoft Internet Explorer browser, the total URL length is limited to 2000 characters. Assuming an average email length of 25 characters, it is recommended that you send no more than 40 emails at one time to avoid these browser limitations. As a best practice, send a maximum of 25 emails at one time from a list.

Before you begin. Your user role must include the Oracle Eloqua Marketing Cloud Service Integration privilege. If this privilege is not enabled for your role, then contact Oracle CRM On Demand Customer Care. In addition, your administrator must configure the email delivery as described in Configuring Email Delivery Using Oracle Eloqua Engage (on page 1874). You must also have your sign in credentials such as Company, Username, and Password set up for Oracle Eloqua Engage.

To send marketing emails using Oracle Eloqua Engage

1. Navigate to a Contact Detail, Contact List, Lead Detail, or Lead List page.
2. At the top of the Detail or List page, click Send Email via Engage.

   If you select the Never Email check box on a Contact or Lead Detail page, then when you click Send Email via Engage from the Detail page, you receive a message that the Never Email field is selected and that the contact or lead will not receive the email. If you click Send Email via Engage from a List page, then you receive this message only if all the records in the Contact List or Lead List have the Never Email check box selected.

   If you have not populated the Email field on a Contact or Lead Detail page, then when you click Send Email via Engage from the Detail page, you receive a warning message that the Email field must be populated to continue. If you click Send Email via Engage from a List page, then Oracle CRM On Demand sends only the records in the Contact List or Lead List that have the Email field set to Oracle Eloqua Engage.
3. In the sign in screen for Oracle Eloqua Engage, enter your credentials, and click Sign In

   TIP: Click Remember me to avoid entering your credentials each time you access Oracle Eloqua Engage.
4. Select the template name for your marketing email from the Select template window.

   Oracle Eloqua Engage inserts the email addresses for the contacts or leads that have the Email field populated in Oracle CRM On Demand into the To: field of the email.

5 Review the content of the email in the Engage window, and personalize its content as required.

6 To send the email, click Send in the Engage window.

Related Topics

See the following topics for related information about marketing emails:

- Configuring Email Delivery Using Oracle Eloqua Engage (on page 1874)
- Oracle Eloqua Marketing Cloud Service Web site

Contact Fields

Use the Contact Edit page to add a contact or update details for an existing contact. The Contact Edit page shows the complete set of fields for a contact.

TIP: You can also edit contact information on the Contact List page and the Contact Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Contact Information	
Account	Account the contact is linked to. **NOTE:** It is possible to link a contact to more than one account; see Linking Contacts to Multiple Accounts (on page 298) for more information.
Email	The email address of the contact. For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses (on page 61).
Opt In	Used in the U.S. and Europe to indicate that a customer has explicitly chosen to participate in either their information sharing or marketing communications.
Opt Out	Used in the U.S. and Europe to indicate that a customer has explicitly chosen *not* to allow their information to be shared or has chosen not to receive marketing communications.
Contact Detail Information	
Contact Type	The type of contact, such as Prospect, Qualified Lead, Customer, Partner, Client, and Competitor. The Client value is specific to Oracle CRM On Demand Financial Services Edition. **NOTE:** If you select the Client value in this field, then the Client Since Date field is automatically populated with the current date.

Field	Description
Department	Name of the department of the contact.
Manager	Name of the manager of the contact.
Lead Source	Lead source of the contact, such as Advertisement, Direct Mail, Email, Web Site, and Other.
Source Campaign	The campaign that generated the contact. If the contact is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the contact is created by a user, the user can enter the information in this field.
Assistant Name	Name of the contact's assistant.
Assistant Phone #	Phone number of the contact's assistant.
Private	Indicates that the contact is private and cannot be viewed by other users.
Never Email	Indicates that the contact does not want to receive email.
Degree	Default values are PHD, M.D., D.O., MBA, RN, R.T., Reg. Pharmacist, Master of Science, Dentist, LPN, and Master of Public Health. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Market Potential	Default values are High, Medium, and Low. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Call Frequency	Default values are No See, 1-2 Times/Year, 3-4 Times/Year, and >5 Time/Year. This field is specific to Oracle CRM On Demand Life Sciences Edition.
YTD Sales	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Route	Default values are Route 1, Route 2, Route 3, and Route 4. This field is specific to Oracle CRM On Demand Life Sciences Edition.
Blocked Reason Code	A value in this field indicates that the contact is blocked from receiving any information, samples, or promotional items for all products. For more information about the contact-blocking functionality, see About Blocked Contacts (on page 302) and Blocking Contacts (on page 303).
Last Call Date	This field is specific to Oracle CRM On Demand Life Sciences Edition.
Best Time to Call	Indicates the best time of day to reach a contact. Default values are Early afternoon, Early morning, Evening, Late afternoon, Mid-morning, and Saturday. This field is specific to Oracle CRM On Demand Life Sciences Edition.

Field	Description
Additional Information	
Account Address fields	Primary address. Inherited from the account linked to the contact. Read only.
Contact address fields	Alternate address of the contact. **NOTE:** If shared addresses are set up for your company, then the contact addresses are read-only, and the address fields change to meet the requirements for shared addresses. Other users in your company can view the shared address data for private contacts. For more information about shared addresses, see Addresses.
Owner	The alias of the owner of the contact record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in the reports that you or your managers run. You can share contact records with other users through the Contact Team or Account team pages. For information about sharing records with other users, see Sharing Records (Teams) (on page 146). Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the contact. This field has a limit of 16,350 characters.
Available Section	
Current Investment Mix	Default values are Aggressive, Moderate, and Conservative. This field is specific to Oracle CRM On Demand Financial Services Edition.
Objective	Default values are Capital Preservation, Income, Income/Growth, Balanced, Growth, Aggressive Growth, and International Diversification. This field is specific to Oracle CRM On Demand Financial Services Edition.
Segment	Default values are White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-Millionaires, and Ultra High Net Worth. This field is specific to Oracle CRM On Demand Financial Services Edition.
Experience Level	Default values are None, Limited, Good, and Extensive. This field is specific to Oracle CRM On Demand Financial Services Edition.

Field	Description
Risk Profile	Default values are Conservative, Moderate, and Aggressive. This field is specific to Oracle CRM On Demand Financial Services Edition.
Primary Goal	Default values are Saving for child's education, Saving for College, New Home, Accumulating wealth, Estate planning, Preserving my assets, and Retirement. This field is specific to Oracle CRM On Demand Financial Services Edition.
Life Event	Default values are Marriage, Birth of Child, Retirement, Divorce, and Other. This field is specific to Oracle CRM On Demand Financial Services Edition.
Investment Horizon	Default values are Short term, Medium term, and Long term. This field is specific to Oracle CRM On Demand Financial Services Edition.
Tier	Default values are Gold, Silver, Bronze, Top 100, Top, Medium, and Low. This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Liabilities	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Net Worth	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Income	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Assets	This field is specific to Oracle CRM On Demand Financial Services Edition.
Total Expenses	This field is specific to Oracle CRM On Demand Financial Services Edition.
Credit Score	This field is specific Oracle CRM On Demand Financial Services Edition.
Marital Status	Default values are Single, Divorced, Married, Partner, Separated, Widowed, and Widower. This field is specific to Oracle CRM On Demand Financial Services Edition.
Own or Rent	Default values are Own or Rent. This field is specific to Oracle CRM On Demand Financial Services Edition.
Home Value	This field is specific to Oracle CRM On Demand Financial Services Edition.
Date of Birth	This field is specific to Oracle CRM On Demand Financial Services Edition.
Tax Bracket	This field is specific to Oracle CRM On Demand Financial Services Edition.
Customer ID	This field is specific to Oracle CRM On Demand Financial Services Edition.
Gender	Default values are F and M. This field is specific to Oracle CRM On Demand Financial Services Edition.

Field	Description
Self-Employed	This field is specific to Oracle CRM On Demand Financial Services Edition.
Client Since Date	Automatically populated with the current date when the Contact Type is set to Client. This field is specific to Oracle CRM On Demand Financial Services Edition.
Referred By	The person who referred the contact. This field is specific to Oracle CRM On Demand Financial Services Edition.
Qualified Date	Automatically populated with the current date when the client is qualified. This field is specific to Oracle CRM On Demand Financial Services Edition.
Status	Status of the Contact. Default values are Active, Quiet Filed, or Dead Filed. This field is specific to Oracle CRM On Demand Financial Services Edition.
Profession	The client's profession. This field is specific to Oracle CRM On Demand Financial Services Edition.

Opportunities

Use the Opportunity pages to create, update, and track opportunities. *Opportunities* are potential sales deals that, at some point, might be included in revenue forecasting.

You can create an opportunity by converting a qualified lead to an opportunity, or you can create a new opportunity for an existing account or contact.

Opportunity records help you to manage your sales pipeline as you work to close deals. All of your opportunity information is visible in one place and is linked to related lead, contact, and account information. This information gives you a complete picture of your opportunity and your customer.

About Opportunities and Forecasts

An *opportunity* is a potential revenue-generating transaction that can be included in your sales forecast when it reaches a specific point in your sales process. For an opportunity or product revenue record to be considered for inclusion in a forecast, the record must have a close date within the forecast period and be owned by a forecast participant. The forecast periods and participants are determined as part of the forecast definition. For more information about forecasts, see Forecasts (on page 329).

NOTE: Your company can set up different sales processes for different roles and different opportunity types. The sales process based on the opportunity type overrides the default sales process based on your user role. When you create an opportunity, the default sales process for your user role is assigned to the opportunity. If you select an opportunity type that has an assigned sales process, then the sales process for the opportunity is determined by the opportunity type you selected.

Tips for Managing Your Opportunity Records

Updating your opportunity information as you work to close a deal facilitates clear team communication and ensures accurate forecasts and reports. It is particularly important to keep certain fields on the Opportunity Detail page up to date:

- The Revenue, Close Date, and Sales Stage fields are critical for tracking pipeline history and are used for trend analyses and forecasting.

- If your company bases its forecasts on opportunities, select the Forecast check box on an opportunity record to add the opportunity to your forecasted revenue at the appropriate time in the sales process. If your company bases its forecasts on products, select the Forecast check box on your linked products instead.

Sales Stages

Every sales process is defined by specific stages. Each sales stage has certain activities and deliverables, or tasks that must be completed before the opportunity is advanced to the next sales stage. As you work on an opportunity, you evaluate it against clearly defined criteria for each stage in your company's sales cycle.

- As criteria are met, update the Sales Stage field in your opportunity record.
- The Probability percentage field on the opportunity record displays a value related to the selected sales stage for the opportunity by default. You can change this value, if needed, to better reflect your particular opportunity while it is in that sales stage. However, when the sales stage changes, the value in the Probability percentage field is automatically updated to the default probability value for the new sales stage, unless the Mass Update feature is used to change the sales stage. If you use the Mass Update feature to change the value in the Sales Stage field on one or more records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage.
- The Expected Revenue field displays a currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field. This figure is used for forecasting.
- Update the Next Step field to reflect the criteria for the next stage in the sales cycle.

About Sales Stages in Searches and List Filters

The sales stages that you can select in search criteria and list filters are determined as follows:

- In a targeted search of the Opportunity record type in the Action bar, if the Sales Stage field is available as a search field, then you can select only the sales stages that are associated with the sales process that is specified for your user role, or the sales stages for the default sales process, if no sales process is specified for your role. The available sales stages are not limited by the opportunity type, even if the Opportunity Type field is available as a search field in the Action bar, and you select an opportunity type for the search.
- In an advanced search of the Opportunity record type, you can select any of the sales stages that exist in Oracle CRM On Demand as filter values for the Sales Stage field. The available filter values are not limited to the sales stages for a specific sales process, even if a default sales process is specified for your role, or you select an opportunity type as a filter for the search.
- When setting up a list filter for the Opportunity record type, you can select any of the sales stages that exist in Oracle CRM On Demand as filter values for the Sales Stage field. The available filter values are not limited to the sales stages for a specific sales process, even if a default sales process is specified for your role, or you select an opportunity type as a filter for the list.

Forecasting

When Oracle CRM On Demand generates forecasts, it determines which records, fields, and data to include according to your forecasting method. If certain conditions are met, it includes those records in the forecasts:

- **Close Date.** Oracle CRM On Demand verifies that the close date for the opportunity or product revenue record falls within the forecast period:
  - If your company's forecasts are based on opportunity revenue, the opportunity record (either alone or linked to products) must show a close date that falls within the forecast period.
  - If your company's forecasts are based on product revenue, the product revenue record must show a close date that falls within the forecast period.
- **Expected Revenue.** Oracle CRM On Demand calculates the expected revenue forecast data, as follows:

  Calculates the total for the Expected Revenue fields in either the opportunity or product revenue records and displays the sum in the Expected Revenue field in the Forecast record.

  NOTE: For the opportunity expected revenue to accurately reflect expected revenue based on opportunity products, the Product Probability Averaging Enabled option must be selected on the company profile.

Enabling the averaging functionality for the product probability ensures that the probability percentage (as recorded in the Probability % field) for each product revenue record is included as part of the calculation. Also, unless the Enable Automatic Update of Opportunity Totals option is selected on the company profile, you must click the Update Opportunity Totals button to update the expected revenue of the opportunity. For more information about updating opportunity totals, see Linking Products to Opportunities (on page 316).

- **Pipeline.** Oracle CRM On Demand calculates the pipeline forecast data, as follows: it calculates the total for the Revenue fields in either the opportunity or product revenue records for all prospective deals within the forecast period, regardless of the status, and displays the sum in the Pipeline field in the forecast record.

  NOTE: For recurring product revenues, only the revenue amount that pertains to the forecast period is included, not the total product revenue.

- **Forecast.** Oracle CRM On Demand retrieves the Revenue field data from records with the Forecast check box selected and displays the sum in the Forecast field in the forecast record:
  - If your company bases its forecasts on opportunities, opportunity records with the Forecast check box selected are included.
  - If your company bases its forecasts on products, product revenue records with the Forecast check box selected are included.

    NOTE: The Forecast flag indicates that there is a high probability that the opportunity will close. So, when this flag is selected, the corresponding revenue is included in your forecasted revenue totals.

    The Forecast flag does not determine whether an opportunity or product revenue record is part of your overall forecast record.

- **Closed Revenue.** Oracle CRM On Demand retrieves Revenue field data from records with a sales stage of Closed-Won and displays the total in the Closed Revenue field of the Forecast record:
  - If your company bases its forecasts on opportunities, opportunity records with a close date within the forecast period are included.
  - If your company bases its forecasts on products, product revenue records with a start/close date within the forecast period are included.

    NOTE: For recurring product revenues, only the revenue amount that pertains to the forecast period is included, not the total product revenue.

Working with the Opportunity Homepage

The Opportunity Homepage is the starting point for managing opportunities.

NOTE: Your company administrator can customize the layout of your Opportunity Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating an Opportunity

You can create an opportunity by clicking the New button in the Recently Viewed Opportunities section. For more information, see Creating Records (on page 51) and Opportunity Fields (on page 326).

Working with Opportunity Lists

The Opportunity Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for opportunities.

Opportunity List	Filters
All Opportunities	All opportunities to which you have visibility
All Closed Opportunities	The opportunities where the Sales Stage field is set to Closed/Won
All Large Opportunities	The opportunities where the revenue is greater than 100,000
Recently Created Opportunities	All opportunities to which you have visibility, sorted by the created date
Recently Modified Opportunities	All opportunities to which you have visibility, sorted by the modified date
My Forecast Opportunities	The opportunities where the Forecast check box is selected
My Opportunities	The opportunities where your name is in the Owner field
My Top Opportunities	The opportunities that you own where the Priority field is set to High
My Recently Created Opportunities	All opportunities that you created, sorted by the created date
My Recently Modified Opportunities	All opportunities that you modified, sorted by the created date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Opportunities

The My Recently Viewed Opportunities section shows the opportunities that you viewed most recently.

Working with Opportunity Tasks

The My Open Opportunity Related Tasks section shows the tasks assigned to you, sorted by the due date and then by priority. You or your manager set the due date or priority. The task priority, such as 1-High, 2-Medium, or 3-Low, is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values (on page 1254).

- To review a task, click the Subject link.
- To review the opportunity with which the task is associated, click the opportunity name.
- To expand the list of tasks, click Show Full List.

Using Reports to Analyze the Pipeline

One or more report sections might be shown on your Opportunity Homepage. Your company administrator can specify which report sections are shown on the page. In the standard edition of Oracle CRM On Demand, the Pipeline Analysis for Current Quarter section is shown, which displays a quarterly analysis of the pipeline in chart format. For information about using the Pipeline Analysis for Current Quarter section, see Analyzing the Pipeline (on page 322).

Adding Sections to Your Opportunity Homepage

If your user role includes the Personalize Homepages privilege, you can add more sections to your Opportunity Homepage, depending on which sections your company administrator has made available for display on your Opportunity Homepage.

To add sections to your Opportunity Homepage

1. On the Opportunity Homepage, click Edit Layout.
2. On the Opportunity Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Opportunities

To manage opportunities, do the following tasks:

- Reassigning Opportunities (on page 314)
- Tracking Partners and Competitors of Opportunities (on page 314)
- Accessing the Sales Process Coach (on page 315)
- Linking Products to Opportunities (on page 316) (allows tracking of product revenue)
- Analyzing the Pipeline (on page 322)
- Creating a Special Pricing Request from an Opportunity (on page 322)
- Specifying Parent and Child Opportunities (on page 322)
- Creating a Deal Registration from an Opportunity (on page 323)
- Splitting Opportunity Revenue Among Team Members (on page 324)
- Tracking Assets (on page 278) (allows linking of products to opportunities as assets)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Sharing Records (Teams) (on page 146)
- Using Assessment Scripts (on page 168)
- Viewing Audit Trails for Records (on page 175)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- About Sales Stages and the Mass Update Feature (on page 325)
- Working with Oracle Social Network (on page 418)

Reassigning Opportunities

If your access levels permit you to do so, you can manually reassign an opportunity by changing the owner or primary custom book on the opportunity record.

NOTE: Depending on the record ownership mode that your company administrator configures for the Opportunity record type, you can assign an opportunity record to an owner or to a primary custom book; however, you cannot assign an opportunity record to both an owner and a primary custom book. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

If your company uses the assignment manager and the Opportunity record type is configured for the user mode or mixed mode of record ownership, then you can also reassign an opportunity to a new owner by selecting the Reassign Opportunity check box on the request.

To reassign an opportunity

1. Select the opportunity that you want to reassign.

   For instructions on selecting opportunities, see Finding Records (on page 74).
2. On the Opportunity Detail page, click Edit.
3. On the Opportunity Edit page, do one of the following:
   - In the Owner field or the Book field, click the Lookup icon, and then select another user or book in the Lookup window.
   - Select the Reassign Opportunity check box to trigger the assignment manager to reassign the opportunity.

   NOTE: The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
4. Save your changes.

NOTE: The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load.

Tracking Partners and Competitors of Opportunities

Oracle CRM On Demand provides areas where you can track information about partners or competitors of your opportunities. For example, you might want to track which companies (accounts) you do business with for Opportunity XYZ or which companies (accounts) you compete with for Opportunity XYZ.

To do so, first link the account acting as your partner or competitor to the opportunity record. (You can link as many partner or competitor accounts as you want.) Then add information to the Opportunity Partner or Competitor Edit page about the partner or competitor, such as its strengths and weaknesses.

Before you begin. Create an account record for each partner or competitor you want to link to your opportunity. For information on adding records, see Creating Records (on page 51).

To track partner and competitor information of opportunities

1 Select the opportunity.

For instructions on selecting opportunities, see Finding Records (on page 74).

2 On the Opportunity Detail page, scroll to the Opportunity Partners or Opportunity Competitors section and do one of the following:

- To link an account, click Add.
- To update information, click the Edit link next to the existing partner or competitor.

3 On the Opportunity Partner or Opportunity Competitor Edit page, enter the required information.

The following table describes some field information for tracking partner or competitor information.

Field	Comments
Opportunity Partner	Click the Lookup icon, and select the account whose relationship and information you want to track as your partner with this opportunity. This is a required field.
Opportunity Competitor	Click the Lookup icon, and select the account whose relationship and information you want to track as your competitor for this opportunity. This is a required field.
Role	Select an option that defines the relationship between your opportunity and this account.
Reverse Role	Select the option that defines the reverse relationship or role.
Start Date	Use this field to record the start date of a partnership. The default is today's date. This is a required field.
End Date	Use this field to record the expiration date of a partnership.
Primary Contact	Key partner or competitor contact for this opportunity.

4 Save the record.

Accessing the Sales Process Coach

At each sales stage of an opportunity, your company might need to collect specific information, according to their business practices. To guide you in completing the information, your company administrator can set up follow-up tasks, require that you fill in specific information, and add information for you to review at each phase of the sales process.

Note: Your company can set up different sales processes (stages, probabilities, and coaching information) for different roles and different opportunity types. For example, if some sales representatives sell products while others sell services, they might be linked to different roles and, as a result, see different options for sales stages and different guidelines in the sales process coach.

To access the coach information relating to the sales stages

1 Select the opportunity.

For instructions on selecting opportunities, see Finding Records (on page 74).

2 On the Opportunity Detail page, click the Coach button.

3 Review the Process Coach page for information that your company administrator set up, and update the opportunity record accordingly.

TIP: You can print the information by right-clicking on the Process Coach page.

NOTE: In the Useful Resources section, click View in the row of any attachment for further information.

4 To update the opportunity, click Edit and revise the record information to meet the coach instructions.

5 Save the opportunity record.

6 When you update the Sales Stage field, the application prompts you to fill in required fields. Also, some fields might default to certain values, but you can update those.

7 Click Close in the Process Coach window.

If your company administrator has set it up, some tasks are added to this opportunity and this opportunity's linked account when you save the record.

Related Topics

See the following topic for related information:

- Setting Up Sales Processes, Categories, and Coaches (on page 1581)

Linking Products to Opportunities

You can link products to opportunities to:

- Track which products belong to the opportunity
- Calculate opportunity revenue based on product revenue
- Base your company's forecasts on product revenue and product quantities

You can also link a product to an opportunity when you create the opportunity. If your company administrator has enabled the Save and Add Product button on the Opportunity Edit page, you can click the Save and Add Product button to save the new opportunity record and navigate directly to the Opportunity Product Revenue Edit page. If you cancel adding the product revenue record, then Oracle CRM On Demand displays the Opportunity Detail page for the previously saved opportunity record.

In the standard application, the Product Category field in opportunity product revenue records is read-only, and the correct product category for the product is automatically selected. If your administrator makes the Product Category field editable for opportunity product revenue records, then you can select a product category. However, if your administrator enforces the relationship between products and their product category, then you receive an error message when you try to save an opportunity product revenue record if the product category and the product are not associated with each other. Your administrator can enforce the relationship between products and their product category by selecting the Enforce Product Category-Product Relationship check box on the company profile.

If your user role has at least one of the following privileges, then you can use the Mass Update feature to update the values in a group of product revenue records linked to an opportunity at the same time:

- Mass Update Any Field
- Mass Update Editable Fields Available on the Page Layout

The Mass Update button is available in the Opportunity Product Revenues section of the Opportunity Detail page and is also available in the Opportunity Product Revenue List page, which opens when you click the Show Full List link in the Opportunity Product Revenues section of the Opportunity Detail page.

NOTE: If your user role has the Mass Update Editable Fields Available on the Page Layout privilege and does not have the Mass Update Any Field privilege, then the set of fields that you can update through the Mass Update feature is restricted. You can update only the fields that are editable for you on the Detail page layout that is assigned to your user role for the record type. For record types that have a dynamic layout, you can update only the fields on a record that are editable for you on the Detail page layout that applies to that record. For more information about the Mass Update feature, see Updating Groups of Records (on page 150).

About Updating Opportunity Totals

Depending on your company setup, the revenue and expected revenue on an opportunity might be automatically updated when you update the products that are linked to the opportunity. If your administrator selects the Enable Automatic Update of Opportunity Totals option on the company profile, then the revenue and expected revenue on an opportunity are automatically updated whenever you make a change to a product that is linked to that opportunity. Similarly, the revenue and expected revenue on an opportunity are automatically updated when you link a product to the opportunity, or remove a product from the opportunity.

If your administrator does not select the Enable Automatic Update of Opportunity Totals option on the company profile, then the revenue and expected revenue on an opportunity are not automatically updated when you update the products that are linked to the opportunity. Instead, the Update Opportunity Totals button is available in the title bar of the Opportunity Product Revenues related information section in the Opportunity Detail page. To update the revenue and expected revenue on the opportunity after you make a change to any of the products that are linked to an opportunity, you must click the Update Opportunity Totals button.

For the Update Opportunity Totals button to work correctly, the Quantity and Revenue fields on the Product Revenue Edit page must be displayed and populated. Your administrator can customize your page layout to make these fields available.

About Product Probability Averaging

When the opportunity revenue is calculated, the calculation that is performed depends on whether the Product Probability Averaging Enabled option is enabled on the company profile, as follows:

- If the Product Probability Averaging Enabled option is selected, then Oracle CRM On Demand uses each linked product to update the Revenue field and the Probability percentage field on the opportunity. Therefore, the Expected Revenue is calculated using the average probability for all linked products.
- If the Product Probability Averaging Enabled option is not selected on the company profile, then Oracle CRM On Demand uses the total product revenue for each linked product to update the Revenue field on the opportunity. The value in the Probability percentage field on the opportunity is not updated. Therefore, the Expected Revenue is calculated using the existing percentage in the Probability percentage field on the opportunity.

NOTE: The method of calculating the Expected Revenue is the same regardless of the setting of the Enable Automatic Update of Opportunity Totals check box on the company profile.

Before you begin:

- Your company needs to inform you of the forecasting method it wants to use. The company forecasting method determines which fields you must select when linking products to your opportunities.
- To update a group of records, your user role must have at least one of the following privileges: Mass Update Any Field, or Mass Update Editable Fields Available on the Page Layout.

To link products to opportunities

1. Select the opportunity.

   For instructions on selecting opportunities, see Finding Records (on page 74).
2. On the Opportunity Detail page, scroll down to the Opportunity Product Revenues section and do one of the following:

- To link a product, click Add.
- To update product information, click the Edit link next to the existing product.

3 On the Opportunity Product Revenue Edit page, fill in the Quantity, Purchase Price, and Close Date fields.

4 If the product represents recurring revenue, fill in the Frequency and # of Periods fields in the Recurring Revenue Information section.

5 If your company forecasts revenue based on product revenue, and you want to include this product revenue record as part of your forecasted revenue totals, or your forecasted quantities, or both, select the Forecast check box.

   NOTE: If your company forecasts revenue, based on opportunities, rather than products, it is best not to select the Forecast check box on the Opportunity Product Revenue record.

6 Save the record.

To calculate opportunity revenue based on linked product revenue

1 Select the opportunity.

   For instructions on selecting opportunities, see Finding Records (on page 74).

2 On the Opportunity Detail page, scroll to the Product Revenues section and do one of the following:

   - To link a product, click Add.
   - To update product information, click the Edit link next to the existing product. (If inline editing is enabled, you can edit the Product Revenues fields inline on the Opportunity Detail page; for more information about editing fields in related information sections, see Updating Linked Records from Main Records (on page 124).)

3 On the Opportunity Product Revenue Edit page, fill in the Quantity, Purchase Price, and Start/Close Date fields.

4 If the product represents recurring revenue, fill in the Frequency and # of Periods fields in the Recurring Revenue Information section.

5 Save the record.

6 If the Update Opportunity Totals button is available in the Opportunity Product Revenue section of the Opportunity Detail page, then click Update Opportunity Totals to update the opportunity totals.

   This totals the product revenue for each linked product and displays it in the Revenue and Expected Revenue fields for the Opportunity.

To base your company's forecasts on product revenue records

1 Select the opportunity.

   For information on selecting opportunities, see Finding Records (on page 74).

2 On the Opportunity Detail page, scroll to the Opportunity Product Revenues section, and do one of the following:

   - To link a product, click Add.
   - To update product information, click Edit. (If inline editing is enabled, you can edit the Opportunity Product Revenues fields inline on the Opportunity Detail page. For more information about editing fields in related information sections, see Updating Linked Records from Main Records (on page 124).)

3 On the Opportunity Product Revenue Edit page:

   a Fill in the Quantity, Purchase Price, and Start/Close Date fields.

   b Make sure that the date in the Start/Close Date field falls within the forecast period, and that the record is owned by a forecast participant.

   c Select the Forecast check box to indicate that you want this record information to contribute to your forecast revenue totals.

d. If the product represents recurring revenue, fill in the Frequency and # of Periods fields in the Recurring Revenue Information section.

4. Save the record.

   NOTE: If a product is not sold, you can update the associated Start/Close date and deselect the Forecast check box on the Product Revenue page for that product to prevent the revenue for the product from being added to your company's forecasts. Alternatively, if one of several products linked to the opportunity is on hold, you can remove the product from the opportunity, and create another opportunity for that product to prevent its revenue from being included in the forecast.

To update a group of opportunity product revenue records

1. In the Opportunity Detail page, scroll to the Opportunity Product Revenues section, and do one of the following:
   - If you want to update only the records that are currently displayed in the Opportunity Product Revenues section, then click Mass Update.
   - If you want to update more records than are currently displayed in the Opportunity Product Revenues section, click Show Full List to open the list of opportunity product revenue records, and then click Mass Update in the Opportunity Product Revenue List page.

     NOTE: When you click Mass Update in the Opportunity Product Revenue List page, only the records that are displayed in the Opportunity Product Revenue List page are available for you to update. For example, if you display only 10 records in the Opportunity Product Revenue List page, then only those 10 records are available for you to update. You can display a maximum of 100 records in the Opportunity Product Revenue List page. If there are more than 100 records in the list, then you can repeat the task until all of the records are updated.
2. In Step 1, clear the check box for the records you do not want to update, and then click Next.
3. In Step 2, select the fields that you want to update, and enter new values for those fields.

   You can select up to five fields to update to new values. To remove existing values from a field, leave the Value column blank in Step 2.
4. Click Finish.

Opportunity Product Revenue Fields

The following table describes field information for product revenue. Your administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

CAUTION: If your company bases its forecasts on products, the information that you enter for product revenue can affect its calculations.

Field	Description
Key Product Information	
Product	Only products marked Orderable by your company administrator can be selected. When you link a product to this opportunity, these fields are copied from the product definition: Product Category, Part #, Type, Status, and Description.
Quantity	Number of units the customer orders. For a recurring product, enter the quantity of the product per recurring period. For example, if you send 10 printer cartridges each month, enter 10 here.
Purchase Price	Product price.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Revenue</td><td>The quantity multiplied by the purchase price. The revenue cannot be overwritten. This field affects the forecasts for opportunity products.</td></tr>
<tr><td>Product Category</td><td>Category carried over with the product definition. This field is read-only by default on opportunity product revenue records, but your administrator can make the field editable.

If this field is editable, and if your administrator enforces the relationship between products and their product category, then the product and the product category on the record must be associated with each other. In this case, the behavior is as follows:

- If a product is already selected in the Product field, and if you select a product category that is not associated with the selected product, then you cannot save your changes.
- If you select a product category before you select a product in the Product field, then when you click the Lookup icon in the Product field, a list of the products that are associated with the selected product category is displayed.

Your administrator can enforce the relationship between products and their product category by selecting the Enforce Product Category-Product Relationship check box on the company profile.</td></tr>
<tr><td>Part #</td><td>Number carried over with the product definition. Read-only.</td></tr>
<tr><td>Type</td><td>Type carried over with the product definition. Read-only.</td></tr>
<tr><td>Status</td><td>Status carried over with the product definition. Read-only.</td></tr>
<tr><td>Description</td><td>Additional information about the product. Limit of 250 characters.</td></tr>
<tr><td colspan="2">Recurring Revenue Information</td></tr>
<tr><td>Start/Close Date</td><td>This date is carried over from the close date on the opportunity. For the product revenue item, this date is the expected close date. For a recurring product, this date is the start date. For a recurring product with a close date that ends on the last day of the month and a start date of mid-month, add one record for the full recurring price and another record for the prorated order.

For example: You start supplying paper to a company on May 15th. After that, you will be sending $500 worth of paper at the end of each month through the end of the year.

For the mid-month order, add a product record with these values:
Revenue = $250
Quantity = 1

For the recurring order, add a second product record with these values:
Revenue = $500
Quantity = 1
Frequency = Monthly
#of Periods = 7 (June through December).</td></tr>
</table>

Field	Description
Frequency	Frequency for a recurring product. The term *bi-weekly* means once every two weeks. When you populate this field, you must also populate the # of Periods field.
# of Periods	Number of periods for the recurring product revenue. Recurring revenue can support a maximum of 260 periods. The length of time that is covered by the total number of periods varies based on the frequency selected (in the Frequency field). For example, if you have weekly recurring revenue you can track revenue for up to five years. **NOTE:** When you populate this field, you must also populate the Frequency field.
Sales Information	
Sales Stage	Read-only. Sales Stage carried over from the opportunity.
Probability	Probability of a successful outcome for the product sale. The initial value in this field is carried over from the sales stage of the opportunity. You can change the value, if needed, to better reflect your particular product. When the sales stage changes, the value in the Probability field for the opportunity record displays the value related to the new sales stage by default, but the value in the Probability field for the product is not overwritten. **NOTE:** If the Mass Update feature is used to change the sales stage for one or more opportunities, then the value in the Probability percentage field for the opportunities is not updated to the default probability percentage for the new sales stage.
Expected Revenue	A currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field.
Account	Account linked to this opportunity. Read-only.
Owner	Person assigned to this opportunity. This value defaults to the opportunity owner. Subsequent changes to the opportunity owner are not reflected in this field. Generally, the owner can update record details, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user’s access. This value affects which records are included in forecasts, as well as in the reports that you or your managers run in the Analytics pages. Each record has only one owner. However, opportunity records can be shared with other users through Opportunity Team or Account Team pages. For instructions, see Sharing Records (Teams) (on page 146).
Forecast	Indicator to include this product in forecasting totals.

Analyzing the Pipeline

In the standard edition of Oracle CRM On Demand, the Pipeline Analysis for Current Quarter section of the Opportunity Homepage shows a quarterly analysis of the pipeline in chart format. You can use this analysis to help you to identify opportunities and challenges. In this section of the Opportunity Homepage, you can place your pointer on the chart to see specific information, click a segment to review a detailed report, or change the categories in the drop-down lists to view different opportunity and revenue analysis reports. For example, you can generate an analysis that shows the number of opportunities by region.

You can also do any of the following:

- Use this analysis to see where your deals are in the sales cycle, so you can take action when it is required.
- Filter by Average (Avg) Number (#) of Days in Stage to see if and where your deals are stalled.
- Filter by Number (#) of Opportunities to see how many opportunities are in each stage of your sales cycle.
- Display a list of the deals in each stage to help you focus on the areas that require your attention.
- Go to the Pipeline Dashboard to see historical and comparative perspectives about your overall performance.

Creating a Special Pricing Request from an Opportunity

You can create a special pricing request from an opportunity.

Note: This feature is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Before you begin. In the standard application, the opportunity special pricing request is not displayed. To add it to the Opportunity Detail page, your company administrator must grant read-only access to the related information for opportunities for your role. Then you must click the Edit Layout link on the Opportunity Detail page and add the special pricing request as a Related Information section (see Changing Your Detail Page Layout (on page 749)).

To create the special pricing request for an opportunity

1. Select the opportunity.
   For information on selecting opportunities, see Finding Records (on page 74).
2. On the Opportunity Detail page, scroll down to the Special Pricing Request related information, and click New.
3. In the Special Pricing Product Detail page, enter the required information, and save the record.
   For information on the fields, see Special Pricing Product Fields (on page 470).

Specifying Parent and Child Opportunities

You can indicate opportunity hierarchies, such as a sales opportunity that has multiple components, by specifying a parent-child relationship. You can create the parent opportunity from the child opportunity or create the child opportunity from the parent opportunity.

If you delete a parent opportunity that has related subopportunities, the association between the parent and child records is deleted, but the child opportunities remain as active records. The Parent Opportunity External Unique ID field remains populated for the child opportunity record in case the parent opportunity is later restored from the Deleted Items page.

If you associate a child opportunity with a new parent opportunity record, the Parent Opportunity ID, Parent Opportunity, and Parent Opportunity External Unique ID fields are populated with the values for the new parent. If the original parent record is restored, it is not reassociated with the child record.

If a single child opportunity is deleted, the parent opportunity and any additional child opportunities remain as active records, and the deleted child opportunity moves to the Deleted Items page. The deleted child opportunity is no longer displayed in the Sub-Opportunities related information list for the parent opportunity, but the Parent Opportunity Id, Parent Opportunity, and Parent Opportunity External Unique ID field values remain populated on the deleted child opportunity record.

The following procedures describe how to specify parent and child opportunities:

To specify a parent opportunity

1 Select an opportunity to be the child opportunity.
   For instructions on selecting opportunities, see Finding Records (on page 74).
2 On the Opportunity Detail page, click Edit.
3 On the Opportunity Edit page, click the Lookup icon next to the Parent Opportunity field.
4 In the Lookup window, select or create the parent opportunity.
5 Save the record.

To specify a child opportunity

1 Select an opportunity to be the parent opportunity.
   For instructions on selecting opportunities, see Finding Records (on page 74).
2 On the Opportunity Detail page, scroll to the Sub-Opportunities section and click New.
3 In the Opportunity Edit page, create the child opportunity.
4 Save the record.

To remove or delete an opportunity hierarchy

1 Select the child opportunity.
   For instructions on selecting opportunities, see Finding Records (on page 74).
2 On the Opportunity Detail page, click Edit.
3 In the Parent Opportunity field, delete the current value, type a new value, or use the Lookup icon to choose a new value.
4 Save the record.

Related Topics

See the following topics for related information:

- Finding Records (on page 74)
- Opportunity Fields (on page 326)

Creating a Deal Registration from an Opportunity

You can create a deal registration from an opportunity.

Note: This feature is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Before you begin. In the standard edition of Oracle CRM On Demand, the Deal Registrations section is not displayed on the Opportunity Detail page. To add it to the Opportunity Detail page, your company administrator must grant read-only access to the related information for opportunities for your role. Then you must click the Edit Layout link on the Opportunity Detail page, and add the deal registration as a Related Information section (see Changing Your Detail Page Layout (on page 749)).

To create a deal registration from an opportunity

1 Select the opportunity.
   For information on selecting opportunities, see Finding Records (on page 74).
2 On the Opportunity Detail page, scroll down to the Deal Registrations related information, and click New.

3 In the Deal Registration Edit page, enter the required information.

For information on the fields, see Deal Registration Fields (on page 448). For information on associating existing deal registrations with existing opportunities and to change existing associations between the two, see Associating Deal Registrations with Opportunities (on page 446).

Splitting Opportunity Revenue Among Team Members

You can split revenue from an opportunity among opportunity team members. The Opportunity Revenue forecast type uses these revenue splits to calculate the revenue noted in the opportunity record. For more information on forecasting, see Forecasts (on page 329) and About Opportunities and Forecasts (on page 309). For more information on opportunity teams, see About Opportunity Teams (on page 325).

To split opportunity revenue among team members

1 Select the opportunity.

For information on selecting opportunities, see Finding Records (on page 74).

2 On the Opportunity Detail page, scroll down to the Opportunity Team section, and do one of the following:

- To add a team member, click Add Users.
- To update team member information, click Edit Users.

3 On the Opportunity Team Edit Users page:

a For each team member, enter information in the required fields, including the Percentage Split field.

b (Optional) Click the Spread Split button to distribute the split percentage evenly among team members.

c (Optional) Click the Refresh Totals button to recalculate the Split Revenue and Totals.

NOTE: The Refresh Totals and Spread Split buttons are not visible unless Enable Opportunity Revenue Split is selected in your company profile, see Setting Up Your Company Profile and Global Defaults (on page 1123).

4 Save the record.

Opportunity Team Fields

The following table describes some of the fields for opportunity teams.

Field	Comments
Percentage Split	This field shows each team member's percentage of revenue. The default value is 100% for the opportunity owner and 0% for other team members.
Split Revenue	This is a calculated, read-only field. The split revenue is calculated by multiplying the opportunity revenue by the percentage in the Percentage Split field.
User Role	Select an option that defines the relationship between the team member and the opportunity team. This is a required field.
Opportunity Access	Designates a team member's access to the opportunity record. This is a required field.

About Opportunity Teams

For some record types, such as accounts, contacts, and opportunities, you can allow a team of users to share a record. To allow a user to share a record, you first add the user to the team for the selected record. Then you specify the access level the user has to the record, and to specified linked records.

Note the following points regarding opportunity teams, account teams, and access to opportunity records:

- If team inheritance is enabled for the Opportunity record type (that is, the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page is selected), then when an opportunity is linked to an account, the account team members are added to the opportunity team automatically.
- If you do not want users to be added to an opportunity team automatically when the opportunity record is linked to an account, then make sure that team inheritance is not enabled for the Opportunity record type.

You can add users to opportunity teams in the following ways:

- By clicking the Add Users button on the Record Detail page.
- By using Assignment Manager. For more information, see About Assignment Rules (on page 1562).
- By converting a lead to an opportunity and selecting the option to copy the lead team to the opportunity. Your administrator determines if the lead conversion layout for your role allows you to copy the lead team to the opportunity when the lead is converted.
- By using groups. For more information, see Group Management (on page 1458).

To ensure that a user does not have access to opportunities linked to an account, you must ensure that the user is not given access through one or more of the following methods:

- The user is not on the opportunity team.
- The user does not have a subordinate who is on the opportunity team.
- The user has not been delegated by another user who has access to opportunities.
- The opportunity is not in a book where the user is a member, or in any of its subbooks.
- The user does not have access to the opportunity records from the role settings.
- The access level of the record type for the account related opportunity is set to any option except the following: No Access or Inherit Primary.

About Sales Stages and the Mass Update Feature

When you use the mass update feature to update the Sales Stage field on opportunity records, the values that are available for you to select in the Sales Stage field for a record are determined by the following:

- The value in the Opportunity Type field
- The default sales process assigned to your user role if one is assigned

If the Opportunity Type field on an opportunity record is blank, and if you do not select an opportunity type when you update the record through the mass update, then the following happens:

- If a default sales process is assigned to your user role, then the sales stages for that sales process are available for selection in the Sales Stage field in step 2 of the mass update.
- If a default sales process is not assigned to your user role, then the sales stages for the default sales process for the company are available for selection in the Sales Stage field in step 2 of the mass update.

If the Opportunity Type field on an opportunity record is already populated, or if you select an opportunity type when you update the record through the mass update feature, then the following happens:

- If a specific sales process is associated with the opportunity type, then the sales stages for that sales process are available for selection in the Sales Stage field in step 2 of the mass update.
- If a specific sales process is not associated with the opportunity type, then the following happens:

  - If a default sales process is assigned to your user role, then the sales stages for that sales process are available for selection in the Sales Stage field in step 2 of the mass update.
  - If a default sales process is not assigned to your user role, then the sales stages for the default sales process for the company are available for selection in the Sales Stage field in step 2 of the mass update.

If the Opportunity Type field on an opportunity record is already populated, but you clear the value from the Opportunity Type field when you update the record through the mass update feature, then the following happens:

- If a default sales process is assigned to your user role, then the sales stages for that sales process are available for selection in the Sales Stage field in step 2 of the mass update.
- If a default sales process is not assigned to your user role, then the sales stages for the default sales process for the company are available for selection in the Sales Stage field in step 2 of the mass update.
- If you do not update the Sales Stage field through the mass update, then the Sales Stage field on the opportunity record remains unchanged when you complete the mass update. However, the next time a user attempts to update the value in the Sales Stage field on the opportunity by editing it inline or on the Opportunity Edit page, the values that are available for selection in the Sales Stage field are determined as follows:
  - If a default sales process is assigned to the user's user role, then the sales stages for that sales process are available for selection in the Sales Stage field.
  - If a default sales process is not assigned to the user's role, then the sales stages for the default sales process for the company are available for selection in the Sales Stage field.

For more information about using the mass update feature, see Updating Groups of Records (on page 150).

Opportunity Fields

Use the Opportunity Edit page to add an opportunity or update details for an existing opportunity. The Opportunity Edit page shows the complete set of fields for an opportunity.

TIP: You can also edit opportunity information on the Opportunity List page and the Opportunity Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

CAUTION: Information you enter for opportunities can affect the revenue forecasts for your company.

The following table provides additional information regarding some fields.

Field	Description
Key Opportunity Information	
Opportunity Name	Name for this opportunity.
Account	Account linked to this opportunity.
Parent Opportunity	The parent opportunity that is linked to this opportunity.
Sales Stage	Stages in the sales process, such as Qualified Lead, Building Vision, Short List, Selected, Negotiation, Closed/Won, or Closed/Lost. **NOTE:** When the sales stage changes, the value in the Probability percentage field is automatically updated to the default probability value for the new sales stage unless you use the Mass Update feature to change the sales stage. If you

Field	Description
	use the Mass Update feature to change the value in the Sales Stage field on one or more records, then the value in the Probability percentage field on the records is not updated to the default probability percentage for the new sales stage.
Next Step	Next action that needs to be accomplished for this opportunity.
Revenue	The amount of revenue for the opportunity. The default value is zero. This value affects the forecasts for opportunity revenue. **NOTE**: Any default or post default values that are specified for this field are ignored.
Close Date	The expected date for the opportunity to close. This is a required field. In the standard application, when you create an opportunity, the default value in the Close Date field is today's date. Your administrator can specify a different default value for the field or can configure the field so that it is blank when you create a new opportunity. If the field is blank, then you must update it. The close date is used in generating forecasts.
Forecast	If this check box is selected, it indicates that the opportunity is to be included in the forecast revenue calculation.
Sales Detail Information	
Status	Status of this opportunity, such as Pending, Lost, or Won.
Priority	Priority level for this opportunity, such as High, Medium, and Low.
Lead Source	Category of the primary source, such as Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Partner, Referral - Employee, Referral - External, Web Site, or Other.
Source Campaign	The campaign that generated the opportunity. If the opportunity is created through the lead conversion process, this field is automatically populated from the Campaign field on the lead record. If the opportunity is created by a user, the user can enter the information in this field.
Probability %	A percentage that reflects the confidence you have that the deal will close with the specified revenue on the specified close date. The Probability percentage field is based on the default probability value for the selected sales stage. You can change the value in the Probability percentage field, if needed, to better reflect your particular opportunity while it is in that sales stage. However, when you select a new sales stage for the opportunity, the value in the Probability percentage field is automatically updated to the default probability value for the new sales stage. **NOTE:** If you use the Mass Update feature to change the value in the Sales Stage field on one or more opportunity records, then the value in the Probability percentage field on the records is not updated to the default probability

Field	Description
	percentage for the new sales stage. If you want the probability percentage on the opportunities to change when the sales stage is updated, then you must update the sales stage on each record individually or through Web services.
Expected Revenue	A currency value that is calculated based on the Revenue field multiplied by the value in the Probability percentage field. A lower percentage in the Probability field reduces the expected value that is included in your revenue forecast.
Reason Won/Lost	Reason for opportunity being won or lost, such as Installed Base, Price, Relationship, Track Record, No Current Project, No Budget, Not Qualified, Lost to Competition, Lost to No Decision, or Other.
Additional Information	
Owner	The owner of the opportunity record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run in the Analytics pages. You can share opportunity records with other users through the Opportunity Team or Account Team pages. For information about sharing records with other users, see Sharing Records (Teams) (on page 146). Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Reassign Opportunity	Indicates that the opportunity should be reassigned. If your company administrator has set up opportunity assignment rules, then selecting this field triggers the assignment manager in Oracle CRM On Demand to process the opportunity again and assign it according to the rules. The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47). **NOTE:** The processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and the current system load. In the case of opportunities, the processing time is also affected by the number of opportunity team members, and the number of accounts and contacts associated with the record. The owner name changes when the record is reassigned.

Field	Description
Description	Additional information about the opportunity. For example, include the product interest (500 parts) and the account (Acme Corp.) in the opportunity description. This field has a limit of 16,350 characters.
Address	The name of the address of the opportunity. This field is not available by default, but your administrator can add it to the Detail page layout. Your administrator can also optionally add the individual address fields to the page layout. If the individual fields for the opportunity address are displayed, then they are read-only.
Account Address	The name of an address from the account that is linked to the opportunity. This field is not available by default, but your administrator can add it to the Detail page layout. Your administrator can also optionally add the individual address fields to the page layout. If the individual fields for the account address are displayed, then they are read-only.

Forecasts

Use the Forecast pages to review, adjust, and submit forecasts. A *forecast* is a saved snapshot of expected revenues over time. Oracle CRM On Demand calculates forecasts for each quarter and breaks down that information by fiscal month.

Forecasts in Oracle CRM On Demand automate a process that is often manual and sometimes inaccurate. Forecasts help companies to develop sales strategies. They also help companies to identify future business needs by giving managers accurate and up-to-date information about expected sales and quarterly progress toward sales targets. Individual sales representatives do not have to compile statistics. Instead, they decide when to include a record in their forecasts. The remainder of the process is automatic.

Your company can base its forecasts on any of the following:

- Opportunity revenue
- Opportunity product revenue and quantities linked to opportunities
- Account revenue
- Contact revenue

The forecast snapshots save the forecasted opportunity, product, or revenue information and the adjusted forecast totals, so that you and your managers can review and evaluate forecast trends. In addition, you can view saved forecasts to examine the history of opportunities on which the team is currently working.

Your company can set up forecasts to run on a weekly or monthly basis. At the start of the specified day (that is, at 1 minute past midnight in the time zone of the hosting facility), Oracle CRM On Demand automatically generates the forecast and displays an alert on My Homepage. After receiving this alert, you can review the forecast to analyze the newly calculated pipeline, forecast, and closed revenue against quota information.

An hour before the next scheduled forecast generation, the current forecast is automatically archived, preventing anyone from editing it.

Working with the Forecast Homepage

The Forecast Homepage is the starting point for managing forecasts. This page lists forecast summary information relevant to you.

You can limit the records listed on the Forecast Homepage using two different methods:

- If the Alpha Search controls are available, then you can find specific forecasts by clicking a column heading to sort the records based on the values in that column, and then clicking a letter in the Alpha bar to show only the records that begin with that letter. You can also type characters in the text field, and click Go to find the records beginning with those characters. Click the All link to show the entire list of forecasts.

  NOTE: If your user language is Korean, Japanese, Simplified Chinese, or Traditional Chinese, then the Alpha Search controls are not available.

- Number of records displayed. Adjust the value in this field to show a greater or lesser number of records in the summary list.

The Forecast Homepage lists your forecasts according to the date on which they were created, with the most recent forecasts listed first. It also gives a summary of important information:

- Status is the current state of the forecast. Successfully completed forecasts will have a status of Active. A forecast with a status of Submitted indicates the forecast is ready for management review.
- Pipeline revenue is the combined revenue from all your records, regardless of the setting of the Forecast check box or sales stage on the individual records. Pipeline revenue is not applicable to account or contact revenue forecasts.
- Forecast revenue equals the total revenue for all records that have the Forecast check box selected.
- Closed revenue equals the total revenue for all opportunities or product revenue with a sales stage value of Closed-Won. For account and contact revenues, the status field value of Closed includes the record in the calculation of the closed revenue. Closed revenue is recognized for the revenue amount that pertains to the forecast period, which is based on the starting closing dates for the record.

Managing Forecasts

To manage forecasts, do the following tasks:

- Reviewing Forecasts (on page 331)
- Refreshing Forecasts (on page 332)
- Viewing and Editing a Forecast Using a Different Currency (on page 333)
- Viewing Forecast History (on page 334)
- Submitting Forecasts (on page 334)
- Unsubmitting Forecasts (on page 334)
- Managing Quotas (on page 335)
- Managing Your Team’s Forecasts (on page 336)

NOTE: Forecasting relies on user roles and reporting hierarchies. To create forecasts successfully, all users who have a user role that is designated as a forecast role must have a status of Active on their user record, and they must have a manager specified in their user record. The manager is specified in either the Reports To field or the Reports To (Alias) field, whichever is present on the user page layout.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Forecast Fields (on page 338)
- Working with the Forecast Homepage (on page 329)
- Setting Up Users (on page 1363)
- Setting Up Users' Sales Quotas (on page 1377)
- Analytics (on page 789)

Reviewing Forecasts

Forecasts are generated automatically either weekly or monthly, according to your company's business process. Each time a new forecast is generated you receive an alert on My Homepage. After you receive the notification, review your forecast. When reviewing your forecast, the forecast summary months align with your company's fiscal calendar definition. If you are using a fiscal calendar such as 4-4-5, 5-4-4, or custom fiscal calendars, your company's forecast periods may not necessarily correspond to a Gregorian calendar. Therefore, if an Opportunity falls in the calendar month of June, it does not mean that it will be forecasted as part of the fiscal month of June. For more information about custom fiscal calendars, see About Fiscal Calendars (on page 1161).

NOTE: When using custom fiscal calendars, the forecast periods are based on the fiscal years and months defined by your company administrator.

To review forecasts

1. Click the Forecasts tab.

   The Forecast Homepage shows forecast summary information that includes Status, Pipeline, and Closed Revenue. You can sort the forecast summary by status, forecast date, or owner (managers only). Pipeline is not applicable to account or contact revenue forecasts.
2. In the Forecast Homepage section, click the Forecast Date link for the forecast you want to review.
3. On the Forecast Detail page, review the information in the following sections:
   - **Forecast Summary**. This section summarizes forecasts by fiscal quarter and month. The Forecast Summary list provides information on Quota, Closed Revenue, Quota %, Forecast amount, Best Case, Pipeline, and Expected Revenue. You can sort the summary list by month.

     Team's Summary by Month. This section shows a list of forecasts for each team member. If you are a manager, you will see the forecast Month, Quota %, Forecast amount, Closed Revenue, Best Case, Pipeline and Last Updated date by Owner Alias (team member). If you drill down on a specific team member's row within the Team's Summary, the corresponding forecast detail page for the selected user appears. On this page you see the team member's individual forecast summary and forecasted revenue in the My Opportunities, My Revenues, or My Products section.

     NOTE: For Account and Contact Revenue forecast types the summary sections do not include Pipeline, Best Case, or Expected Revenue.
   - **Team's Product Summary.** (Opportunity Product forecast type only) This section shows a list of forecasted products for each team member. If you are a manager, you will see the Closed Quantity, Forecasted Quantity, Pipeline Quantity, Closed Revenue and Expected Revenue by Owner Alias (team member) and product. If you drill into a specific team member's row within the Team's Product Summary, the corresponding forecast detail page for the selected user appears. Here you will see their individual Forecast Summary and forecasted quantities by Product in the My Products section.

     NOTE: The Forecast Detail page shows only five of your team's records. To view the entire list of records, click Show Full List under the Team's Summary by Month section.

- **My Opportunities.** If you are using the Opportunity Revenue forecast type, this section appears as part of your forecast detail. This section lists current opportunities, and indicates whether the opportunity is forecasted. It also shows the Close Date, Account Name, Revenue amount, current Sales Stage, and Next Step, if specified, for each opportunity.
- **My Revenues.** If you are using the Opportunity Product, Account or Contact Revenue forecast type, this section appears as part of your forecast detail. This section lists current revenues, and indicates whether the revenue record has been forecasted by the owner (forecast flag selected). It also shows the Start and Close date, Product name, Revenue amount, and Account Name for each revenue record that you enter.

  Additional columns might be displayed in the My Revenues section, depending on the revenue type being forecasted.

  For opportunity product revenue forecasts, the following columns are displayed:

  - Opportunity Name
  - Sales Stage

  For account and contact revenue forecasts, the following columns are displayed:

  - Product Category
  - Status
  - Contact Name
- **My Products.** If you are using the Opportunity Product forecast type, this section appears as part of your forecast detail. A row for each product forecasted is listed along with the corresponding product category, closed quantity, forecasted quantity, pipeline quantity, closed revenue, and expected revenue. These values are the sum of all forecasted opportunities for the selected user forecast. To see the forecasted opportunities associated with a specific product, click the product name.

  NOTE: If you are using the Opportunity Product forecast type, you can also view all forecasted opportunities within a specific product category by clicking the Product Category field.

  You can verify the forecast type that was used in a forecast and that was based on the Type field in the Forecast information section.

Viewing and Editing Forecasts Using a Different Currency

The View In currency conversion feature allows you to specify in which currency you want to display your forecast. For more information on viewing and editing forecasts in different currencies, see Viewing and Editing a Forecast Using a Different Currency (on page 333).

Refreshing Forecasts

Forecasts are snapshots of revenue data for specific periods. If an opportunity or revenue record is updated, you can refresh some values for your current, unsubmitted forecast to ensure that the forecast reflects the most up-to-date information. You can then adjust those records in the Forecast Summary section to more accurately reflect the revenue that will be generated.

Updating the record values that contribute to the forecast amounts, and then recalculating the forecast totals, allows for more consistent forecasting. Updates to the Revenue, Close Date, Sales Stage, Probability, Forecast, Quantity, or Status fields can affect your forecast.

To update record values and refresh forecast amounts

1. Click the Forecasts tab.

   The Forecast Homepage lists your forecasts according to the date on which they were created, with the most-recent forecasts listed first.

2 In the Forecast Homepage Section, click the Forecast Date link for the forecast that you want to update.
3 In the My Opportunities, My Revenues, or My Products section on the Forecast Detail page, click the Opportunity Name, Start/Close Date, or Product link for the record that you want to modify.
4 On the Detail page, click Edit.
5 On the Edit page, update the appropriate values for the opportunity or revenue record, and click Save.
6 Navigate back to the Forecast Detail page, and then click the Refresh link in the record row.
7 On the Forecast Detail page, click Rollup.

   The forecast summary totals are updated based on the opportunity or revenue records that you modified.

NOTE: To capture any updates made to the opportunity or revenue records in the forecast summary, click Rollup.

When you click Rollup, any prior adjustments to the forecast summary totals are overwritten with the new values brought in from the opportunity or revenue records; therefore after updating your records, you might still want to adjust your forecast summary to reflect your sales expectations more accurately.

Adjusting Forecast Totals

Sales representatives and managers can make high-level adjustments by month to their current, forecasted revenue to make sure that the automatically generated forecast reflects values based on professional judgement. You can adjust the following forecast summary fields:

- Forecast
- Best Case

NOTE: Only the forecast owner can adjust forecast totals.

To adjust forecast totals

1 Click the Forecasts tab.
2 In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to adjust.
3 In the Forecast Summary section, click Edit.
4 On the Forecast Edit page, type your adjusted revenue values in the Forecast or Best Case fields.
5 Click Refresh Totals to verify your adjusted values, and then click Save.

NOTE: Best case revenue is not applicable to account or contact revenue forecasts.

Viewing and Editing a Forecast Using a Different Currency

The view-in currency conversion feature allows you to specify in which currency your forecast should be displayed. By default, the forecast will be displayed in your native currency (the default currency selected on your user profile or your company's default currency). You can also edit forecasts in the selected currency if you are managing opportunities in multiple economic zones.

If the forecast is edited while being viewed in euro (EUR), then the user can enter forecast values in euro. When the edited forecast is saved, it is converted to and saved in your company's default currency.

To view a forecast using a different currency

1 Click the Forecasts tab.
2 From the Forecast Homepage, click the Forecast Date link for the forecast that you want to review.
3 On the Forecast Detail page, select the currency from the View In list in the Forecast Summary title bar.

The view-in currency value displays your user profile currency by default. If your user profile currency is not defined, the View In selector displays your company's currency by default. All of your company's active currencies are available for selection.

When you select a view-in currency, the forecast values are converted from the stored forecast currency (company currency) to the selected view-in currency, using the valid exchange rates for the forecast date.

If you drill down on a forecast record, or select a view-in currency that does not have a valid exchange rate defined for the forecast date, the forecast is displayed in your company's default currency instead, and an advisory message is displayed.

Viewing Forecast History

You can view a history of forecasts to determine trends over time.

To view your forecast history

1. Click the Forecast tab.
2. In the Forecast Homepage section, click the column heading in which you want to sort the records.
3. Review the trends over time for forecast, pipeline, and closed revenue.

Submitting Forecasts

The last step in creating a forecast is to submit it to your manager for review. When the forecast reflects the amounts that you want to include in your company's forecasts, submit the forecast.

NOTE: Managers can submit forecasts for their direct reports. This option must be selected when you set up your forecast definition. If this option is not selected, managers cannot submit their forecasts until all of the managers' direct reports submit their forecasts.

Submitted forecasts cannot be edited. If you need to adjust a submitted forecast, your manager or administrator must first unlock (unsubmit) the record. For more information, see Unsubmitting Forecasts (on page 334).

To submit your forecast

1. Click the Forecasts tab.
2. In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to submit.
3. On the Forecast Detail page, click Submit Forecast in the Forecast Summary title bar.

Related Topics

See the following topic for related information:

- Unsubmitting Forecasts (on page 334)
- Setting Up the Forecast Definition (on page 1575)

Unsubmitting Forecasts

For a forecast owner to update a submitted forecast, a manager or administrator must first unlock (unsubmit) the record.

To unsubmit a forecast

1. Click the Forecasts tab.
2. In the Forecast Homepage section, click the Forecast Date link for the forecast record you want to unlock.
3. On the Forecast Detail page, click Unsubmit Forecast.

   This action unlocks the forecast, allowing direct reports to update and adjust their forecasts, and then resubmit the forecasts.

NOTE: Clicking Unsubmit Forecast sets the forecast status to Active.

Related Topics

See the following topics for related information:

- Submitting Forecasts (on page 334)
- Setting Up the Forecast Definition (on page 1575)

Managing Quotas

If your company administrator is not responsible for setting your quotas, you can create and update quotas for periods throughout the year using the Edit Quota page. This allows you to compare and adjust your quotas against forecasts. You also can review your quota target history for every period, in each year.

When selecting the year for a quota to start, you can select the current calendar year, or one of the preceding three years, or one of the upcoming three years. After a quota is created, the monthly quota values are automatically reflected in the forecast after the forecast is generated. All active quotas are added together for the month and the totals are displayed in the forecast. If you do not want a quota to be included in your forecast, set the Status field to Inactive until you are ready to track the quota.

To manage your quota

1. From any page, click the My Setup link in the top right corner.
2. From the Personal Homepage, click the Personal Profile link in the Personal Profile section.
3. From the Personal Profile page, click the My Profile link in the Personal Information section.

   My Profile allows you to define quotas and sharing groups, as well as change your currency, language, and time zone.
4. On the Personal Detail page, scroll down to the Quotas section, and then click New Quota.

   Existing quotas appear in the Quotas list, and can be sorted by year, name and status. If you want to modify a listed quota, select Edit in the record-level menu for the quota record you want to edit. To remove a quota from the list, select Delete in the record-level menu for the quota record you want to delete.
5. On the Edit Quota page, complete the required fields for the new quota:
   a. Select the calendar year in which the quota will begin.

      NOTE: The year that you select on this page is the calendar year, not the fiscal year. The fiscal year can be different from the calendar year. For example, your company's fiscal year might begin on 01 April and end on 31 March (in the following calendar year).
   b. Make sure the Status is Active.
   c. Enter a name for the quota.
6. Enter quota information for each month. (The monthly quota fields start with the first month of your company's fiscal year.)
7. Save the quota.

To spread a total quota amount evenly across months of the year

1. On the Personal Detail page, scroll down to the Quotas section, and then click New Quota.
2. On the Edit Quota page, enter the required information, making sure the quota Status is Active.
3. In one of the month fields, enter the total quota amount for the year, and then click Sum.

   The amount appears in the Total Quota field.
4. Click Spread.

The total amount is spread equally across the 12 months of the year, and the apportioned amount appears in the fields associated with each month.

5. Save the quota.

   The quota appears in the Quotas list.

Managing Your Team's Forecasts

If you are a manager, you can:

- Review and adjust forecasts for your team
- View all opportunities owned by your team
- Unsubmit a forecast so that a team member can adjust it

Your team consists of all employees associated to roles that report to you. This role hierarchy is set up in User Administration. For more information, see Setting Up Users (on page 1363).

To review forecasts and opportunities for your team

1. Click the Forecasts tab.
2. In the Forecast Homepage section, click the Forecast Date link in the forecast record.

   The Forecast Detail page shows a summary of your team's totals, the totals for each team member by month, and the date the forecast was last updated.
3. On the Forecast Detail page, click the Owner Alias link of the team member whose forecast you want to view.

   TIP: If you want to display the forecast summaries of all your team members, click the Show Full List link.

   The team member's Forecast Detail page appears. From this page, you can review the team member's forecast totals and all of the individual's forecasted opportunities, but since the details are read-only, you cannot edit them.

Forecast Detail Page

The Forecast Detail page displays forecast information for the selected forecast participant. This page shows the forecast summary, which lists projected revenue amounts by fiscal month, the corresponding user quota and percent attainment, as well as a list of the individual's forecasted opportunities, revenues or products.

Managers can also see their team's summary by month. As a result, managers can see their own detailed forecasted records and the summary records of their direct subordinates for the forecasted period.

Fiscal months are indicated by their standard names in the Forecast Summary and Team's Summary sections. However, the duration of the month is based on your company's definition of the fiscal calendar . For example, the month of October might start on 15 October and end on 14 November.

The following table describes the tasks that you can do from the Forecast Details page.

To do this	Follow these steps
Change the currency for a displayed forecast	In the Forecast Summary title bar, click View In and select the currency.
Show all of your team's forecast summaries	Click Show Full List under the Team's Summary by Month section. This section is available only if you are a manager-level user. In this section, a line item is listed for each team member by fiscal month.

To do this	Follow these steps
Show all of your team's product summaries	Click the Show Full List link under the Team's Product Summary section. This section is only available if you are a Manager level user and you are using the Product Quantity Forecast type. In this section, a line item is listed for each team member by product.
Show the forecast detail for a specific user	In the Owner Alias column of a team's summary section, click the name of the user for whom you want to see forecast details.
Show all forecasted opportunity records for a specific user	Click Show Full List under the My Opportunities section. This section is available only if you are using the Opportunity Forecast type. This page lists a row for each revenue record forecasted along with the corresponding close date, forecast flag, opportunity name, account name, revenue, sales stage, and next step.
Show all forecasted revenue records for a specific user	Click the Show Full List link under the My Revenues section. This section is available only if you are using the Product Revenue, Account Revenue or Contact Revenue Forecast type. This page lists a row for each revenue record forecasted along with the corresponding start and close date, forecast flag, product name, opportunity name, account name, revenue, and sales stage.
Show all forecasted product records for a specific user	Click Show Full List under the My Products section. This section is available only if you are using the Product Quantity Forecast type. This page lists a row for each product forecasted along with the corresponding closed quantity, forecasted quantity, pipeline quantity, closed revenue and expected revenue. These values are the sum of all forecasted opportunities for the user.
Show all forecasted opportunities within a product category for a specific user	In the Product Category column, click the category for which you want to see the forecasted products. This page shows the specific values for each of the related opportunities for the selected product category, including the close date, opportunity name, individual quantities, and revenue amounts.
Show all forecasted opportunities for an individual product for a specific user	In the Product Name column, click the product for which you want to see forecasted opportunities. This page shows the specific values for each of the related opportunities for the selected product, including the close date, opportunity name, individual quantities, and revenue amounts.
Update a forecasted opportunity	In the My Opportunities, My Revenues or My Product Revenues section within the Forecast Detail, click Opportunity Name to navigate to the opportunity details. When you save your changes, return to the forecast by clicking Back to Forecast Detail, and then click Refresh.

To do this	Follow these steps
	Any adjustments made to the opportunity detail records are not captured in the forecast summary section until you click Rollup.
Rollup forecasted revenue	In the Forecast Summary section, click Rollup. Clicking Rollup updates (recalculates) the total fields based on your opportunity updates. Any adjustments made to the forecast revenue amounts will be overwritten after clicking Rollup.
Update the forecast or best case revenue amounts	In the Forecast Summary title bar, click Edit. Clicking Edit opens the Forecast Edit page. Enter revenue adjustments, and click Save.
Submit a forecast	In the Forecast Summary section, click Submit Forecast. The Status to Submitted field is updated, indicating to a manager that the forecast is ready for review.
Unsubmit a forecast	In the Forecast Summary section, click Unsubmit Forecast. The forecast is unlocked. The status is set to Active, allowing a user to update and adjust his or her forecast, and then resubmit it. Only the reporting manager or company administrator can perform this action.

Forecast Fields

The forecast revenue related fields (quota, closed revenue, quota %, forecast, pipeline, and expected revenue) are calculated. See the following table for more information about the fields.

Field	Description
Best Case	(Optional) This field represents a best-case estimate of the revenue that will be produced by all opportunity or product revenue. This field is not applicable to account or contact revenue forecasts.
Closed Revenue	Read-only. This field is calculated. If your company bases its forecasts on opportunities, then the closed revenue is the total of all eligible opportunities with a sales stage of Closed-Won. If your company bases its forecasts on products, then the closed revenue is the total of all eligible product revenue records during that period, with the sales stage of Closed-Won. If your company bases its forecasts on account or contact revenues, then the closed revenue is the total of all eligible revenue records with a status of Closed.
Expected Revenue	Read-only. This field is a weighted average. The value is calculated based on the Potential Revenue field multiplied by the value in the Opportunity Probability field. This field is not applicable to account or contact revenue forecasts.

Field	Description
Forecast	The value in this field is calculated when the forecast is generated. However, you can adjust the value in this field manually to make sure that the forecast reflects values based on your professional judgment. If the Forecast check box is selected in the Opportunity record, the forecast is the total of all opportunities during the forecast period. If the Forecast check box is selected in the Revenue record, the forecast is the total of all revenue records during the forecast period.
Owner	Indicates the person who owns or is responsible for this forecast. Oracle CRM On Demand generates this information.
Last Updated	The date when the team member's forecast record was last updated. The forecast date is displayed by default. If a user performs an edit, rollup, submit, or unsubmit for a forecast, this field shows the date the record was changed. Oracle CRM On Demand generates this information.
Pipeline	Read-only. This field is calculated. The pipeline is the total of all opportunity or product revenue records for the forecast period, regardless of the setting of the Forecast check box or sales stage on the individual records. This field is not applicable to account or contact revenue forecasts.
Quota	Read-only. The sales revenue target for the forecast period. The quota can be set up by the individual user or the administrator. Only active quotas are used when creating forecasts.
Quota %	This field is calculated. The quota percent is the closed revenue value divided by the quota value.
Status	Oracle CRM On Demand generates the forecast status. The forecast status can be one of the following: ■ **Active.** Oracle CRM On Demand sets this status when forecast generation is complete. ■ **Submitted.** Oracle CRM On Demand sets this status when you click Submit Forecast. The record is locked unless your manager or a company administrator unlocks (unsubmits) it. ■ **In Progress.** Oracle CRM On Demand sets this status while the forecast is being generated. ■ **Incomplete.** Oracle CRM On Demand sets this status if there is an error while reading, associating, or rolling up revenue. An incomplete forecast can sometimes occur due to a user error, such as a hierarchy issue, or other data-related problems. ■ **Pending.** Oracle CRM On Demand sets this status if an issue occurs while processing your company's forecast. If your company administrator did not receive an email notification describing the forecast issue, contact Customer Care.

Field	Description
	- **Archived.** Oracle CRM On Demand sets this status 1 hour before it runs a new forecast. After this status has been set, the forecast becomes read-only, and you cannot unlock it.

Addresses

Use the Address pages to create, update, and track addresses that are shared between account, contact, dealer, and partner records.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include working with addresses, then the Address tab might be excluded from your setup.

If your company administrator enables the address record functionality by selecting the Enable Shared Addresses check box on the company profile, then the addresses that you create in the Address pages can be associated with multiple account, contact, dealer, or partner records (shared address functionality). Companies that do not have Enable Shared Addresses configured do not share address information between any records, and the address information in each record is specific to each record (unshared address functionality).

NOTE: Oracle CRM On Demand supports shared address functionality only for account, contact, dealer and partner record types. For other record types containing address fields, such as leads, households, orders, and so on, Oracle CRM On Demand only supports unshared address functionality.

Characteristics of the Shared Address Functionality

Some characteristics of the shared address functionality when configured for a company are as follows:

- Account, contact, dealer, and partner records can share and reuse a common, top-level address record.
- Addresses have many-to-many relationships. That is, accounts can have multiple addresses (for example, hospitals might have multiple buildings with unique addresses), and contacts can have multiple addresses (for example, a doctor can have a hospital address, a clinic address, and a private office address). Multiple contacts can use each address (for example, more than one doctor can work at each address) and multiple accounts can use each address (for example, multiple clinics might share the same building at a particular address).
- Using a simple search, you can search for all address records that share a ZIP or postal code, a city, a province, a state, or an address (Address line 1 field). With advanced search, you can find all record types (accounts, contacts, dealers, and partners) that match user keywords, such as the city, state, ZIP, or postal code. You can search for addresses that are shared, and you can confirm which contacts, accounts, dealers, or partners are using a particular address. However, you cannot search record types to find all the accounts, contacts, dealers, or partners that use a particular shared address.
- Addresses are treated as independent entities that can be imported into Oracle CRM On Demand from an external set of addresses. This is useful when using a third-party system for data quality and address validation (to ensure that correct address conventions are used and that there are no typographic errors or duplications).
- Addresses have no territory affiliations. Territory affiliations are defined only in relationship to account, contact, dealer, or partner records.

- Addresses are not book-enabled. Book segmentation is defined only in relationship to account, contact, dealer, or partner records.
- A top-level shared Address record supports the addition of Web applets. However, for Release 26 and later, Account Address, Contact Address, Dealer Address, or Partner Address records also support the addition of embedded Web applets as a Related Information section. For more information on how your administrator sets up Web applets for your company, see Creating Web Applets for Record Types (on page 1279).

What Tasks Can You Perform with Address Records?

You can create, edit, or delete address records from the top-level tab. You can also create or remove address records directly from account, contact, dealer or partner records, or add existing address records to account, contact, dealer or partner records. In addition, you can edit certain fields on the shared address record (such as the Address Type picklist, or the Primary, Billing, and Shipping settings) within account, contact, dealer or partner records. The remove functionality removes the association between the address and the account, contact, dealer or partner record, while retaining the shared address as a global resource. Standard lists are available on the Address homepage, which users can access by default. Because a shared address cannot be owned by users, these lists are prefaced by the word *ALL*, and not *MY*.

About Denormalized Fields

When shipping and billing addresses are set for accounts, dealers, and partners, and primary addresses are set for contacts, Oracle CRM On Demand stores the address fields directly on the parent object. This process is called *denormalization*. If the shared address fields are deleted or updated, Oracle CRM On Demand propagates the changes to the account, contact, detail, or partner records that are using the shared address so that all address data is consistent and data integrity is preserved. The denormalization also improves the search capability.

What Is the Effect of the Propagation of Denormalized Fields?

Because of the propagation of changes to fields on the account, contact, dealer, and partner records, updates to addresses might take several minutes to process by the Oracle CRM On Demand propagation business service. In addition, if a top-level shared address is deleted, then a similar delay might occur when the Oracle CRM On Demand propagation business service is removing address values in the denormalized fields. If a timeout or error occurs, the Oracle CRM On Demand propagation business service attempts to repropagate the changes at midnight, every night. If propagation does not take place, your company administrator might have to manually apply the changes, or contact Oracle CRM On Demand Customer Care for assistance, if necessary.

Working with the Address Homepage

The Address Homepage is the starting point for managing addresses.

NOTE: Your company administrator can customize the layout of your Address Homepage. In addition, if your user role includes the Personalize Homepages privilege, then you can add sections to the page and remove sections from the page.

Creating an Address

You can create an address by clicking the New button in the Recently Modified Addresses section. For more information, see Creating Records (on page 51) and Address Fields (on page 352).

Working with Address Lists

The Address Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for shared addresses.

Address List	Filters
All Addresses	All addresses, sorted alphabetically using the address name.

Address List	Filters
Recently Modified Addresses	All addresses, sorted by the modified date.
Recently Created Addresses	All addresses, sorted by the created date.
All Validated Shared Addresses	All addresses that have been marked as validated by the customer, sorted alphabetically using the address name. Validation processing occurs outside of Oracle CRM On Demand and is used by many companies to standardize address data, confirm that the addresses exist, and that they are usable by official agencies such as the United States Postal Service. For information on marking addresses as validated, see Marking Shared Addresses as Validated (on page 346).
All Non-Validated Shared Addresses	All addresses that are not marked as validated by the customer, sorted alphabetically using the address name.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Addresses

The Recently Modified Addresses section shows the shared addresses that you modified most recently.

Adding Sections to Your Address Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Address Homepage:

- All Addresses
- Recently Modified Addresses
- Recently Created Addresses
- All Validated Shared Addresses
- All Non-Validated Shared Addresses

To add sections to your Address Homepage

1. On the Address Homepage, click Edit Layout.
2. On the Address Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Related Topics

See the following topics for related information about shared addresses:

- Addresses
- Managing Addresses (on page 343)
- Address Fields (on page 352)

Managing Addresses

For information about managing addresses, see the following topics (which include procedures for both shared and unshared addresses):

- Creating New Shared Addresses in Account, Contact, Dealer or Partner Records (on page 343)
- Sharing Addresses Between Account, Contact, Dealer, and Partner Records (on page 345)
- Marking Shared Addresses as Validated (on page 346)
- Adding DEA Information to Contact Addresses (on page 346)
- Creating New Unshared Addresses in Account, Contact, Dealer, or Partner Records (on page 348)
- Removing Addresses from Accounts, Contacts, Dealers, or Partners (on page 349)
- Deleting Shared Addresses (on page 349)
- About Linking Records to Addresses (on page 350)
- Viewing Address Records from Accounts, Contacts, Dealers, or Partners (on page 351)
- Accessing a Map for an Address (on page 351)
- About Geocode Fields in the Address Record Type (on page 354)

NOTE: The Addresses feature is not part of the standard edition of Oracle CRM On Demand, so shared addresses might not be available to your company.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Working with Records (on page 46)

Creating New Shared Addresses in Account, Contact, Dealer or Partner Records

When shared address functionality is configured, you can create a new address record directly in an account, contact, dealer, or partner record, without having to go to the Address tab by completing the Addresses section on the Detail page for the record if the Addresses section is configured. After you create an address record, it is listed in the Address homepage.

Before you begin. The Addresses related information is not shown on the Account, Contact, Dealer, or Partner Detail pages by default. To allow you to see this information, your company administrator must grant access to the Addresses related information for your role. You or your company administrator must then add the Addresses related information to your Details page layout for the record type. For more information on customizing your Detail page layouts, see Changing Your Detail Page Layout (on page 749).

To create a new shared address record from an account, contact, dealer, or partner record, the Enable Shared Addresses check box must be selected, while the Validate Shared Addresses check box must be deselected in your Company Profile.

NOTE: When shared addressing is not configured; that is, the unshared address functionality is being used, you cannot create new shared addresses from the Addresses section on the Detail pages.

To create new shared addresses in account, contact, dealer, or partner records

1. On the Detail page for the account, contact, dealer, or partner record, navigate to the Addresses section if it is configured.
2. To create a new shared address, click New.

NOTE: The New button is displayed only if address validation is turned off for the company. If address validation is turned on, then the new addresses can be added only from the Address tab.

3. Enter an address name in the Address Name field (for example, Head Office Address).

   NOTE: The Address Name field is a required field, and can be used in searches. When you move to using shared addresses, carefully consider your naming standard for the address records. Recommendations include a concatenation of key address fields with a numeric suffix, or a combination of city and state (or province) with an externally generated ID. For example, if the address name is LebanonNJ38A08833, when searching for all address names starting with LebanonNJ, then you will find all the addresses in the borough of Lebanon that are in the state of New Jersey (NJ).

4. Complete the fields in the Address Information section as required.

   When you have completed the Address record, it is listed in the Address section of the Detail page. The Address field that is displayed is a concatenation of the existing address fields of the Address object. For example, if Address 1 is 43 2nd St., City is Newark, State is NJ, and Country is U.S.A, then the Address field on the Address section is displayed as: 43 2nd St., Newark, NJ, USA. For information about the Address record fields, see Address Fields (on page 352).

5. Click Save.
6. After saving the shared address information, complete the following steps, as required, by selecting Edit from the record-level menu for the address record:
   a. For accounts, dealers, or partners:
      - If an address is used for billing purposes, select Billing for the address record.
      - If an address is used for shipping purposes, select Shipping for the address record.

      Oracle CRM On Demand copies the address information to the Billing or Shipping section, as appropriate.
   b. For contacts, if an address is a primary contact address, select Primary for the address record.

      Oracle CRM On Demand copies the address information to the primary Contact section.
   c. For any of the four record types, to select the address type, use the Address Type picklist.

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

      NOTE: This field is required.
   d. Click Save.

To create a new shared address in account, contact, dealer, or partner records (alternate method)

1. On the Detail page for an account, dealer, or partner record, navigate to the Billing or Shipping address section.

   On the Detail page for a contact record, navigate to the primary Contact address section.
2. Click the Lookup icon at the top right.
3. In the Address search window, you can create a new address by clicking New if address validation is not set up for your company.

   NOTE: The New button is displayed only if address validation is turned off for the company. If address validation is turned on, then new addresses can be added only from the Address tab.

   NOTE: If shared addresses are set up for your company, then the Billing, Shipping and primary Contact Address sections of the Detail pages are read-only.

4. Complete the fields for the new address in the Address window.

   When you have completed the Address record, it is listed in the Account Address section of the Detail page. The Address field that is displayed is a concatenation of the existing address fields of the Address object. For example, if Address 1 is 43 2nd St., City is Newark, State is NJ, and Country is U.S.A, then the Address field on the Address section is displayed as: 43 2nd St., Newark, NJ, U.S.A. For information about the Address record fields, see Address Fields (on page 352).

5. Save the address record.

   In the Detail page, Oracle CRM On Demand lists the new address in the Addresses section.

   If the address record is a billing or shipping address on an account, dealer, or partner record, then Oracle CRM On Demand selects billing or shipping and populates the Billing or Shipping section in the record with the new address information. If the address record is a primary contact address, then Oracle CRM On Demand selects Primary and populates the Contact address section in the record with the new contact address information.

Sharing Addresses Between Account, Contact, Dealer, and Partner Records

When shared addressing is configured for your company, you can add an existing address record, or edit an address that is listed in the Addresses section of an Account, Contact, Dealer, or Partner Detail page. Addresses that are common to account, contact, dealer, or partner records are linked by adding the same address record in the Detail page for each record.

Before you begin. The Addresses related information is not shown on the Account, Contact, Dealer, or Partner Detail pages by default. To allow you to see this information, your company administrator must grant access to the Addresses related information for your role. You or your company administrator must then add the Addresses related information to your Details page layout for the record type. For more information on customizing your Detail page layouts, see Changing Your Detail Page Layout (on page 749).

To add an existing, shared address record to an account, contact, dealer, or partner record, the Enable Shared Addresses check box must be selected in your company profile. If the Validate Shared Address check box is selected in your company profile, only validated addresses can be added to the record in this procedure.

To share an address between account, contact, dealer, or partner records

1. On the Detail page for the record, navigate to the Addresses section if it is configured for the record.
2. In the Addresses section, click Add.
3. In the Address Edit window, click the address selector beside the Address field.

   NOTE: The Address Name field is read-only.

4. In the Address Search window, select an address from the list of validated addresses if address validation is turned on for your company, or select an address from the list of all available addresses if address validation is turned off.

   For information on validating addresses, see Marking Shared Addresses as Validated (on page 346).

   NOTE: If address validation is turned on for your company, and if the available addresses have not been validated, then no addresses will appear in the list of addresses for selection.

5. Select the address type from the Address Type picklist.

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

   NOTE: This field is required. You can associate the same address multiple times with the same account, the same dealer, the same partner, or with the same contact by using a different address type. For more information, see the Address Type field in Address Fields (on page 352).

6. For accounts, dealers, or partners, you can click Billing if the address is used for billing purposes, and click Shipping if the address is used for shipping purposes.

   Oracle CRM On Demand copies the address information to the Billing or Shipping section, as appropriate.

NOTE: For multiple instances of shared addresses that use different address types, removing an instance or removing the Shipping or Billing flag for an instance, removes the Shipping or Billing flag on all instances of the shared address. For example, suppose you have three instances of a shared address that is named Cain Clinic, and the address is set to 123 Main Street, Lansdowne PA 19050. For this address, the first instance type is set to Office, the second instance type is set to Postal, the third instance type is set to Other, and all instances have the Shipping flag selected. If you delete any of the instances, for example, the Office type, or if you deselect the Shipping flag in the instance, then Oracle CRM On Demand deselects Shipping in all three instances (Office, Postal, and Other) of this address. Similarly, if all instances have the Billing flag selected and you deselect the Billing flag in one instance or if you delete an instance, then Oracle CRM On Demand also deselects the Billing flag for all three instances.

7. For contacts, you can click Primary if the address is a primary address.
8. Save the record.

Marking Shared Addresses as Validated

Oracle CRM On Demand changes the validation status of an address record from Not Validated to Validated if the Validation Date field is set in the Address Detail page. Typically, customers use their own methods, which are external to Oracle CRM On Demand, to determine whether addresses are valid, and then mark them as validated in Oracle CRM On Demand by setting the Validation Date field.

If address validation is set up for a company, then only addresses marked as validated are shown or added to lists in account and contact records, and you cannot add new addresses to accounts or contacts. However, you can add them to the Addresses homepage.

Before you begin. To mark Address records as validated, you require the Validate Shared Addresses privilege. Both the Enable Shared Addresses and the Validate Shared Addresses settings must be selected in the company profile, to set up address validation for a company.

To mark a shared address as validated

1. In an Address Detail page, click Edit.
2. Navigate to the Key Address Information section, and set the Validated Date field, using the date selector.

   NOTE: You cannot set a validated date to a future date.

3. Save the address record.

   Oracle CRM On Demand changes the validation status of the address record from Not Validated to Validated.

NOTE: The Validation Status field in the address record does not appear by default. Your company administrator must set it up.

Adding DEA Information to Contact Addresses

Contacts in the pharmaceutical or medical industry in the U.S. use a Drug Enforcement Administration (DEA) number to receive controlled substances from suppliers. For example, a physician might work in several different hospitals and require a different DEA number for each location to receive controlled substances or pharmaceuticals at each location. Complete the following procedure to add DEA numbers to a contact address record.

Before you begin. The DEA fields are not available on a Contact Address page by default. Your company administrator must customize the Contact Address Detail page and allow access for you to add DEA information to a contact address.

About DEA Numbers

A DEA number is a series of numbers assigned to a health care provider (such as a medical practitioner, dentist, veterinarian) allowing the provider to write prescriptions for controlled substances. The DEA number is used to track controlled substances. However, it is often used by the pharmaceutical or medical industry as a general prescriber number; that is, it is used as a unique identifier for anyone who can prescribe medication. A valid DEA number consists of: two letters, six numbers, and one check digit. The first letter is a code identifying the type of registrant. The second letter is the first letter of the registrant's last name. Of the seven digits that follow, the seventh digit is a checksum that is calculated as follows:

- Add together the first, third, and fifth digits. Call this SUM135.
- Add together the second, fourth and sixth digits and multiply the sum by 2. Call this DoubleSUM246.
- Add SUM135 and DoubleSum246. Call this CHECK.
- The rightmost digit of CHECK is used as the check digit in the DEA number.

For example, the DEA string *XY1234563* meets the requirements as follows:

```
1 + 3 + 5 = 9
```

```
2*(2+4+6) = 24
```

```
9 + 24 = 33
```

The last digit is 3.

The registrant type (the first letter of the DEA number) can be one of the following:

- A - Deprecated (It can be used by some older entities.)
- B - Hospital/Clinic
- C - Practitioner
- D - Teaching Institution
- E - Manufacturer
- F - Distributor
- G - Researcher
- H - Analytical Lab
- J - Importer
- K - Exporter
- L - Reverse Distributor
- M - Mid-Level Practitioner
- N - Military Practitioner
- P - Narcotic Treatment Program
- R - Narcotic Treatment Program
- S - Narcotic Treatment Program
- T - Narcotic Treatment Program
- U - Narcotic Treatment Program
- X - Suboxone/Subutex Prescribing Program

To add DEA information to a contact address

1. On a Contact Detail page, navigate to the Addresses section, if this section is configured.
2. From the list of addresses, select Edit from the record-level menu (if shared addressing is configured), or Edit Rel (if shared addressing is not configured, and you are configured to access the top-level Address records).
3. Complete the DEA fields as described in the following table, and then save the Contact Address record.

DEA Field	Description
DEA Number	A valid DEA number.

DEA Field	Description
DEA Issue Date	The date when the DEA number is issued from the Federal Government of the United States. Use the Date selector to specify the date.
DEA End Date	The date when the DEA number is no longer active or valid. Use the Date selector to specify the date. This field displays the DEA issue date plus three years by default.
DEA Active Flag	Read-only field. Oracle CRM On Demand determines whether the DEA number is active or inactive. Oracle CRM On Demand uses the DEA Issue Date, the DEA End Date, and the current date to determine the status.
Acceptable Schedules	A long text field where you can enter comma separated values for acceptable schedules, for example, Schedule 1, Schedule 2, Schedule 3, and so on. **NOTE:** This field does not affect any Oracle CRM On Demand processing.

Creating New Unshared Addresses in Account, Contact, Dealer, or Partner Records

To create a new unshared address in account, contact, dealer, or partner records, complete the fields in the Addresses section in the Detail page for the record.

Before you begin. The Addresses related information is not shown on the Account, Contact, Dealer, or Partner Detail pages by default. To allow you to see this information, your company administrator must grant access to the Addresses related information for your role. You or your company administrator must then add the Addresses related information to your Details page layout for the record type. For more information on customizing your Detail page layouts, see Changing Your Detail Page Layout (on page 749).

To create a new unshared address record in an account, contact, dealer, or partner record, the Enable Shared Addresses setting must be deselected in your company profile.

To create a new unshared address in account, contact, dealer, or partner records

1. On an Account, Contact, Dealer, or Partner Detail page, navigate to the Addresses section if the section is configured.
2. To add a new unshared address, click New.
3. In the Edit Address page, select the applicable country for the address from the Country picklist, and complete the remaining address fields for the record.

   NOTE: Oracle CRM On Demand adjusts the address fields to follow the addressing conventions of the country. For more information on mapping the address conventions, see About Countries and Address Mapping (on page 1615).

4. Save the address in the Addresses section.

To create a new unshared billing or shipping address in account, dealer, or partner records

1. On an Account, Dealer, or Partner Detail page, navigate to the Billing or Shipping sections under Additional Information.
2. Click the edit icon in the upper right to edit the billing or shipping unshared address fields.
3. Select the applicable country for the address from the Country picklist, and complete the remaining billing or shipping address fields for the record.

NOTE: Oracle CRM On Demand adjusts the address fields to follow the addressing conventions of the country. For more information on mapping the address conventions, see About Countries and Address Mapping (on page 1615).

4 Save the shipping or billing address.

The shipping or billing address is listed in the Addresses related information section for the record, with the billing or shipping setting selected, as applicable.

To create a new unshared primary address in contact records

1 On a Contact Detail page, navigate to the Contact section under Additional Information.
2 Click the edit icon in the upper right to edit the contact unshared address fields.
3 Select the applicable country for the address from the Country picklist, and complete the remaining contact address fields for the record.

NOTE: Oracle CRM On Demand adjusts the address fields to follow the addressing conventions of the country. For more information on mapping the address conventions, see About Countries and Address Mapping (on page 1615).

4 Save the contact address.

The contact address is listed in the Addresses related information section for the record, with the Primary setting selected.

Removing Addresses from Accounts, Contacts, Dealers, or Partners

To remove an address record from accounts, contacts, dealers, or partners, complete the following procedure.

To remove an address from an account, contact, dealer, or partner record

1 On the Detail page for the record, navigate to the Addresses section if it is configured for the record.
2 In the Addresses section, click Remove in the record-level menu for the address record.

If the address is shared, then Oracle CRM On Demand removes the address from the Detail page for the record; that is, it removes the association between the address and the parent record. However, the address record is not deleted and continues to exist. For information on deleting a shared address, see Deleting Shared Addresses (on page 349).

If the address is unshared, then Oracle CRM On Demand deletes the address from the Detail page for the record.

Deleting Shared Addresses

When deleting a top-level shared address record, Oracle CRM On Demand removes all denormalized fields to the associated account, contact, dealer or partner records.

NOTE: If you delete a shared address, then it is deleted from all records in which it is shared, that is, account, contact, dealer, and partner records. However, it is not deleted from any associated call activity records. For example, if the shared address is included as part of the associated contact in a contact call, then deleting the shared address does not remove the address from the contact call. However, it is removed from the contact record.

Example of the Removal of Denormalized Fields When Deleting a Shared Address

Consider the following example, where the top-level shared address is 550 Walnut Lane, Swarthmore PA 19050, USA. Two accounts and eight contacts are using this shared address. One account has the address listed as the billing address, while the other account has it listed as the shipping address. Five of the eight contacts have this address as their primary address. When the shared address is deleted, Oracle CRM On Demand does the following:

- Deletes the associations with the accounts and contacts
- Clears the billing address information from the account where it was listed as a billing address
- Clears the shipping address information from the account where it was listed as a shipping address
- Clears the contact address information from the five contacts where it was listed as a primary address

Considerations for Restoring a Deleted Shared Address

If you restore a deleted address, you must update the Billing and Shipping settings because when Oracle CRM On Demand restores the address record, it does not restore the address settings to the original values. You must readjust these values to avoid the creation of erroneous data. For example, consider the following:

- Shared Address 1 for Account 1 is marked as a billing address, and you delete Shared Address 1.

  Oracle CRM On Demand clears the billing address fields for Account 1.
- You then associate a new Shared Address 2 as the billing address.

  Oracle CRM On Demand populates the Account 1 billing address fields with those of Shared Address 2.
- You restore Address 1 from the Deleted Items list.

  Oracle CRM On Demand restores Address 1 to the Addresses list and reassociates this shared address to Account 1, but does not restore the original Billing setting.

  Address 2 and Address 1 appear in the list of addresses associated with Account 1. Address 2 remains the billing address with the appropriate fields denormalized to the account, until you manually reset Billing to Address 1.

NOTE: You cannot have more than one billing or shipping address in an account, dealer, or partner record, so you must readjust the Billing and Shipping settings in this situation when an address is restored. This also applies to the Primary setting for restored contact addresses.

For more general information about deleting and restoring records, see Deleting and Restoring Records (on page 173).

To delete a shared address

1. Navigate to the shared Address List page.
2. On the record-level menu for the shared address, click Delete.
3. Click OK on the confirmation window.

About Linking Records to Addresses

The following are some of the record types that you can link to addresses:

- Account
- Contact
- Dealer
- Partner
- Custom Objects 1 to 15

You can link the Account, Contact, Dealer, or Partner records to track the record types associated with the address. You can also link shared address records to custom objects. However, you cannot link unshared address records to custom objects. For more information about linking records, see Linking Records to Your Selected Record (on page 117).

Viewing Address Records from Accounts, Contacts, Dealers, or Partners

To view an address associated with accounts, contacts, dealers, or partners, that is, for Account Address, Contact Address, Dealer Address, or Partner Address records, complete the following procedure.

To view an address record from accounts, contacts, dealers, or partners

1. On the Detail page for the record, navigate to the Addresses section if it is configured for the record.
2. For the Address record that you want to view, click View from the record level menu in the appropriate row.

Accessing a Map for an Address

You can access a map for an address record from the following areas:

- From within an address list or from the address section of a Detail page that contains an address section.
- From the following fields, if the fields are available on the Detail page for the record type:
  - The Address field and Account Address field on the Opportunity record type
  - The Address field on the Custom Object record types
- From a concatenated field that contains at least one Address field.
- From any lists or Related Information sections containing Address fields.

Before you begin: To access the Maps page, you must have the Maps Integration privilege in your user role.

To access a map for an address

1. Navigate to one of the following:
   - The address section, for example, the Billing, Shipping, or Primary address section in the Detail page for the following record types: Address, Account, Contact, Dealer, Partner, Broker Profile, Lead, User, or Household
   - The Detail page for the Opportunity record type or a Custom Object record type
   - The Addresses Related Item section in the Detail page for the Account, Contact, Dealer, or Partner record types
   - A concatenated field that contains at least one Address field, for example, a concatenated field on an account Detail page based on the following fields: Account Name, Account Type, Billing Address 1 and Shipping Country where Billing Address 1 and Shipping Country are Address fields from Billing and Shipping Address fields.
   - A list or Related Information section that contains an Address field
2. Do one of the following:
   - For an address section in a Detail page, click the map icon in the address section.

     NOTE: The map icon is also available in the Billing and Shipping address sections in the company profile. Your company administrator maintains the company profile.

   - For an address on an opportunity or custom object record, click the map icon in the Address field or the Account Address field.
   - For an address list in the Addresses Related Item section, click Map from the drop-down list to the left of the address.

     NOTE: The Map link is not available in Address List pages.

   - For a concatenated field, click the Map icon to the right of the field.

     If the concatenated field contains address fields from more than one address, after clicking the Map icon, Oracle CRM On Demand will present a pop-up window where you can click the Map icon for the specific address.

- For a list or Related information section that contains an Address field, click the Map icon to the right of the field.

Oracle CRM On Demand opens a map for the address if the mapping functionality can resolve the address location from the address information, as follows:

- If the address record contains a latitude and longitude but no other address information, then Oracle CRM On Demand opens the map with a pin at the location for the latitude and longitude and displays the latitude and longitude when you hover over the pin.
- If the address record contains the latitude and longitude along with other address information, then Oracle CRM On Demand opens the map with a pin at the location for the latitude and longitude, and displays the address information when you hover over the pin.
- If the address record contains address information but no latitude nor longitude, then Oracle CRM On Demand opens the map with a pin at the address location, and displays the address when you hover over the pin. If the mapping functionality cannot determine a location from the address information available, then it prompts you to choose an address from a list of suggested addresses determined from the available address information.
- If the address record contains neither address information nor latitude and longitude information, then Oracle CRM On Demand opens a map of North America.

NOTE: Address sections in broker profile and lead records do not contain fields to hold latitude and longitude information. Consequently, clicking the Map icon in the address section for a broker profile or lead record always redirects you to the Maps page where the mapping functionality initiates a search for the concatenated address.

Related Topics

See the following topics for related information:

- Addresses
- Working with the Address Homepage (on page 341)
- Maps (on page 362)

Address Fields

Use the Address Edit page to add an address or update details for an existing address. The Address Edit page shows all the fields that are available for an address.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Address Information	
Address Name	The name of the address record. This field has a limit of 50 characters. It must be unique and is required by default.
Validated Date	(Optional) The date when the address information has been validated by an external source. Use the date selector to specify or update this date. This date is relevant only if address validation is being used, otherwise it is ignored.

Field	Description
Address Type	This picklist field specifies the address type. The following are the address types that are available by default: Residential, Office, Vacation Home, Other, Vanity, Private, Postal, Hospital, and Clinic. (Required.) **NOTE:** This picklist field is not available when you are creating a new address record using the Address Edit page. It is only available when you edit a saved address record. For more information, see Creating New Unshared Addresses in Account, Contact, Dealer, or Partner Records (on page 348) and Setting the Address Type for Unshared Addresses Using Edit Rel (on page 1196).
Address Information	
Country	The country or territory used in the address record. Use the drop-down list to select a country or territory for your address. **NOTE:** The Address Information fields match the country-specific postal requirements. For example, the address fields for the United States use ZIP codes, while address fields for many other countries use postal codes. The following Address Information fields (Address1 and Address2) are shown if the Country field is not selected. For more information about postal requirements, see About Countries and Address Mapping (on page 1615).
Address1	Address line 1. Typically, this field holds the street address, for example, 10 Main Street. It has a limit of 200 characters. It is converted to the street numbering convention for the selected country (for example, number and street for Canada or U.S.A.). The conversion is based on the Country field.
Address2	Address line 2. This field handles any additional street address details. It has a limit of 100 characters.
Address3	Address line 3. This field handles any additional street address details. It has a limit of 100 characters. **NOTE:** This field is not present in the default layout of Address Edit or Detail page, if a country is not selected.
City	The city in the address record.
Province	The province or territory in the address record, for example, New Brunswick. **NOTE:** Oracle CRM On Demand changes this field to State, if the country selected uses States (for example, India or USA).
Post Code	The postal code for example, M1C 3J6, or the ZIP code for U.S.-based addresses, for example, 19050.
Description	This field has a limit of 100 characters.
Comments	This field has a limit of 1999 characters. **NOTE:** This field does not appear by default. Your company administrator must set it up.

Field	Description
Validated Status	Indicates whether the address has been validated or not and is calculated based on the Validated Date field. **NOTE:** This field does not appear by default. Your company administrator must set it up.
NOTE: The following fields used for geocoding functionality are also available through Web services. These geocoding fields do not appear by default. Your company administrator must set them up. These fields are read-only. For detailed information on how to use these fields, see About the Geocoding of Address Information (on page 355).	
Geocode Status	The status of the geocoding process for the address record. For new address records, Oracle CRM On Demand sets the field to a null value. If a geocoding succeeds for an address, Oracle CRM On Demand sets the field to Success. If the geocoding fails for an address, then Oracle CRM On Demand sets the field to Failed. If you edit an address, then Oracle CRM On Demand resets the field to a null value.
Geocode Match Code	The accuracy or quality of the geocoding process as indicated by a match code number. For a given match code, if multiple latitude and longitude matches are returned, Oracle CRM On Demand uses the first latitude and longitude match returned by Oracle Spatial.
Gecode Match Vector	A string of 17 characters that specifies the quality of matching of the input address attributes during the geocoding operation to derive the latitude and longitude associated with the address.

Related Topics

See the following topics for related information about shared addresses:

- Addresses
- Working with the Address Homepage (on page 341)
- Managing Addresses (on page 343)
- About Geocode Fields in the Address Record Type (on page 354)
- About the Geocoding of Address Information (on page 355)

About Geocode Fields in the Address Record Type

Oracle CRM On Demand provides the following geocode fields for the Address record type. These fields are not available by default.

- Latitude
- Longitude

Your company administrator must add these fields to the Address page layout if you require these fields. For information on adding fields to page layouts, see Customizing Static Page Layouts (on page 1267).

Geocode fields are generally used to locate geographical coordinates commonly known as latitude and longitude from address values, such as the street address and the postal or ZIP code. These geocode fields are used to support mapping and location-based functionality in Oracle CRM On Demand client applications, such as Oracle CRM On Demand Disconnected Mobile Sales, or to pinpoint a location on a mapping application, such as Google Maps. If users do not populate these fields, then they are limited to using the standard-mapping functionality in the client applications using the available address values.

Latitude and longitude are typically represented using a degree, minute and second notation, for example 59º20'30"N. However, in Oracle CRM On Demand, they are represented and stored as decimal data with plus or minus signs, as follows:

- For latitude, you can enter any values in the range -90.0000000 to +90.0000000, with a maximum of 7 digits after the decimal point. If the number of digits after the decimal point exceeds 7, then Oracle CRM On Demand rounds off the value. For example, Oracle CRM On Demand rounds up a latitude value of 89.12345678 to 89.1234568.
- For longitude, you can enter any values in the range -180.0000000 to +180.0000000, with a maximum of 7 digits after the decimal point. If the number of digits after the decimal point exceeds 7, then Oracle CRM On Demand rounds off the values. For example, Oracle CRM On Demand rounds down a longitude value of 179.12345674 to 179.1234567.

In addition, Oracle CRM On Demand supports generic decimal format for latitude and longitude, that is, Oracle CRM On Demand supports numerals with a period (.) as the decimal separator. Some locales use a comma (,) as the decimal separator, however you must enter the decimal data using a period (.) as the decimal separator for these locales. Oracle CRM On Demand displays the decimal number as it is stored in its database and does not perform any local formatting of this decimal data.

To add latitude and longitude values into Oracle CRM On Demand, you must convert the degree-minute-second representation of latitude and longitude to decimal representation as follows:

```
Decimal Degrees = Degrees + Minutes/60 + Seconds/3600
```

The latitude or longitude value must have a plus or minus sign because negative values are allowed. A positive latitude value is north (N) of the equator, while a negative latitude value is south (S) of the equator. A positive longitude value is east (E) of the Prime Meridian, while a negative longitude value is west (W) of the Prime Meridian. For example, the following table shows example values for the Latitude and Longitude fields in Oracle CRM On Demand for several cities.

City	Latitude	Latitude Value in Oracle CRM On Demand	Longitude	Longitude Value in Oracle CRM On Demand
Stockholm, Sweden	59º20'N	59.3333333	18º04'E	18.0666667
Darwin, Australia	12º27'S	-12.4500000	130º50'E	130.8333333

NOTE: Oracle CRM On Demand does not perform the conversion of latitude and longitude to the required representation in Oracle CRM On Demand. The Latitude and Longitude fields only store the geocodes associated with an address. Typically, Oracle CRM On Demand client applications, such as Oracle CRM On Demand Disconnected Mobile Sales, perform further processing and conversion of the geocode data. However, Oracle CRM On Demand can use the information in an address record to automatically find the corresponding latitude and longitude values for the address using Oracle Spatial and populate the Latitude and Longitude fields. For more information, see About the Geocoding of Address Information (on page 355).

About the Geocoding of Address Information

If Enable Geocoder is selected in the Company Profile page, Oracle CRM On Demand uses the information in an address record to find the corresponding latitude and longitude values for the address using Oracle Spatial and if successful, then populates the latitude and longitude fields in the address records with these values. This process of finding and populating the latitude and longitude from the address information is known as *geocoding*. Oracle CRM On Demand uses Oracle Spatial to asynchronously find the corresponding geocodes. Oracle CRM On Demand bypasses the geocoding of any records containing preexisting values in the latitude or longitude fields.

Oracle CRM On Demand regeocodes the latitude and longitude fields when:

- You clear the latitude and longitude fields
- You edit the address fields

About the Geocoding Fields in Address Records

Address records contain three fields related to geocoding:

- **Geocode Status.** The status of the geocoding process for the address record:
  - **Null value.** Address is not geocoded.
  - **Success.** Address successfully geocoded.
  - **Failed.** Address failed geocoding.

    A geocoding failure typically occurs due to incorrect address data, the unavailability of a geocode for the address, or if the address match is too generic.
- **Geocode Match Code.** How accurately the latitude and longitude matches with the given address as indicated by an integer value:

Geocode Match Code	Description
0	No geocoding match for the address.
1	Exact geocoding match for the address.
2	Geocoding match, with a compromise on match accuracy for the street type, or with the suffix or prefix portion of the street address.
3	Geocoding match, with a compromise on match accuracy for the house number portion of the street address.
4	Geocoding match, with a compromise on match accuracy for the street address.
10	Geocoding match, with a compromise on match accuracy for the ZIP or postal code.
11	Geocoding match, with a compromise on match accuracy for the city name.
12	Geocoding match, with a compromise on match accuracy for the ZIP or postal code and city.

Oracle CRM On Demand Customer Care configures an acceptable level for Geocode Match Code for your company. Oracle CRM On Demand saves the latitude and longitude fields returned from the geocoding process in an address record only when the match code is less than or equal to the level set by Oracle CRM On Demand Customer Care. This value is typically set to 3 by default.

If Oracle CRM On Demand does not find any matches in the geocoding process, it sets Geocode Match Code to 0 and does not populate the latitude and longitude in an address.

- **Geocode Match Vector.** A string of 17 characters that provides a detailed summary of which parts of an address contributed to the accuracy or inaccuracy of the latitude and longitude returned for the input address. A question mark indicates an unused field position. Oracle CRM On Demand sets the Geocode Match Vector field for any addresses that are not geocoded to a series of question marks: ?????????????????. Each position contains a value ranging from 0 to 4.

  The following table lists the positions within the string, and the address attribute corresponding to each position. The address attributes are not address fields in Oracle CRM On Demand but a conceptual representation of various address parts that constitute an address, like a house number or street prefix, and so on.

Position Within Geocode Match Vector	Address Attribute
0 to 4	Not used
5	Street Address - House Number
6	Street Address - Street Prefix
7	Street Address - Street Base Name
8	Street Address - Street Suffix
9	Street Address - Street Type
10	Not used
11	City
12 to 13	Not used
14	State
15	Country
16	ZIP or Postal Code
17	Not used

NOTE: Oracle Spatial derives the Street Address attributes such as House Number or Street Prefix and so on by parsing the street address information contained in the Address1, Address2, and Address3 fields in an Oracle CRM On Demand address record. How Oracle Spatial derives these attributes varies by country.

The numeric value to which Oracle CRM On Demand sets the position in the Geocode Match Vector string can vary from 0 to 4 as follows:

Geocode Match Vector Positional Value	Description
0 or 1	Oracle CRM On Demand has found an exact match for the address attribute during geocoding.

Geocode Match Vector Positional Value	Description
2 or 3	The address attribute is not null, however, Oracle CRM On Demand has not found a match for the attribute during geocoding.
4	The address attribute is null, but Oracle Spatial managed to find a close match, based on approximation.

For more information on these geocoding fields and other address fields, see Address Fields (on page 352).

Geocoding Example

The following example shows how you can use and interpret the geocoding fields, when Oracle CRM On Demand geocodes an address. Consider an address with the following field values:

Address Field in Oracle CRM On Demand	Value
Address Name	Ji Yang
Country	USA
Number/Street	1 Oracle Dr
Address 2	Nashua
Address 3	Not Set
City	Nashua
County	Not set
State	NH
Zip	03062

When Oracle CRM On Demand geocodes this address, Oracle Spatial decomposes the address and sets the address attribute values as follows:

Address Attributes in Oracle Spatial	Value
Name (from Street address)	Ji Yang
House Number (from Street address)	1
Street Name from Street field	Oracle Dr
City	Nashua

Address Attributes in Oracle Spatial	Value
State	NH
Country	US
ZIP Code	03062

Oracle Spatial attempts to find a match based on these address attributes, by searching independently on individual attributes, and then using a combination of address attributes to find the best approximation for the latitude and longitude.

After successfully geocoding, Oracle CRM On Demand sets the fields as follows:

Oracle CRM On Demand Address Field	Value	Comment
Geocoding Status	Success	Geocoding is successful.
Geocoding Match Code	1	Oracle Spatial found an exact match.
Longitude	-71.46006	None
Latitude	42.71004	None
Geocoding Match Vector	??030402010??000?	The Geocoding Match Vector for this example. The vector is set irrespective of whether the geocoding is successful or not. Even for a low match code of 4 where no latitude and longitude gets set, the vector is still set and details the attributes that contributed to the failure.

You can interpret the vector value of ??030402010??000? as shown in the following table:

Geocode Match Vector Position	Value	Address Attribute	Interpretation of the Match Vector Value
1	?	None	Not used
2	?	None	Not used
3	0	None	Not used
4	3	None	Not used
5	0	House Number	Exact match found for this attribute.

Geocode Match Vector Position	Value	Address Attribute	Interpretation of the Match Vector Value
6	4	Street Prefix	Address attribute value is null, but a close match was found based on approximation.
7	0	Street Base Name.	Exact match found for this attribute.
8	2	Street Suffix	This address attribute has a value, but no match was found for the value.
9	0	Street Type	Exact match found for this attribute.
10	1	None	Not used
11	0	City	Exact match found for this attribute.
12	?	None	Not used
13	?	None	Not used
14	0	State	Exact match found for this attribute.
15	0	Country	Exact match found for this attribute.
16	0	Postal Code	Exact match found for this attribute.
17	?	None	Not used

Related Topics

See the following topics for related information about addresses:

- Addresses
- Working with the Address Homepage (on page 341)
- Managing Addresses (on page 343)
- Address Fields (on page 352)
- About Geocode Fields in the Address Record Type (on page 354)

Assets

Use the Asset pages to create and update assets, and to create lists of assets. An *asset* is a record of a product that has been sold to a customer or company.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking asset information, then the Asset tab might be excluded from your setup.

Working with the Asset Homepage

From the Asset Homepage, you can create lists of assets, and you can create asset records.

NOTE: Your administrator can customize the layout of your Asset Homepage. In addition, if your user role includes the Personalize Homepages privilege, then you can add sections to the page and remove sections from the page.

Creating an Asset

You can create an asset by clicking New in the Recently Modified Assets section. For information about the fields in asset records, see Tracking Assets (on page 278). For general information about creating records, see Creating Records (on page 51).

Working with Asset Lists

The Asset Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for assets. The lists include the asset records that are created in the following areas of Oracle CRM On Demand:

- The Asset pages
- The Vehicle and Portfolio pages
- The Assets related information section in the Detail pages for account, contact, and custom object records

Asset List	Filters
All Assets	All assets to which you have visibility, regardless of who owns the asset.
Recently Modified Assets	All assets to which you have visibility, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists.

Viewing Recently Modified Assets

The Recently Modified Assets section shows the titles of the asset records that were modified most recently.

NOTE: If a serial number is entered in an asset record, then the serial number is used as the title of the asset. Otherwise, the product name is used. In the Recently Modified Assets section of the Asset Homepage, and in other pages where the asset title appears, you can drill down from the asset title to open the asset record.

Adding Sections to Your Asset Homepage

If your user role includes the Personalize Homepages privilege, then you can add additional sections to your Asset Homepage, depending on which sections your company administrator has made available for display on your Asset Homepage.

To add sections to your Asset Homepage

1. On the Asset Homepage, click Edit Layout.

2 On the Asset Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.

3 Click Save.

Related Topics

See the following topic for related information:

- Tracking Assets (on page 278)

Managing Assets

For step-by-step procedures that are common to many record types, see the following topics:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Working with Lists (on page 125)

For information about tracking assets and the fields in asset records, see the following topic:

- Tracking Assets (on page 278)

Maps

Use the Maps page in Oracle CRM On Demand to find addresses on a map or to obtain driving directions to an address. To use the Maps page, you must have the Maps Integration privilege in your user role. In addition, your administrator must make the Maps tab available for your user role. If the Maps tab is not present in the tabs across the top of your pages in Oracle CRM On Demand after your administrator makes the Maps tab available to your user role, then you can add the Maps tab to your tab layout. For information about adding tabs to your tab layout, see Displaying Your Tabs (on page 749).

NOTE: To enable the Maps Integration privilege and make the Maps tab available to your role, your administrator must have the Manage Maps Integration privilege in her user role. If your administrator does not have the Manage Maps Integration privilege in her role, then the administrator must contact Oracle CRM On Demand Customer Care and ask to have the privilege enabled.

You can do the following in the Maps pages:

- Find an address on a map.
- Perform a proximity search to find addresses on records in Oracle CRM On Demand that are located within the following:
  - The specified radius of your current location
  - The specified radius of another location
- Obtain driving directions to addresses on a map.

NOTE: With the exception of India and Singapore, the Map functionality provides addresses in the predominant language of the country or jurisdiction contained in the address. For example, for addresses in Qatar, the addresses are provided in Arabic, and for addresses in Russia, the addresses are provided in Russian, and so on. For addresses containing India and Singapore, the Map functionality provides the addresses in English. For Canada, the Map functionality provides the addresses in English except for Quebec, where addresses are provided in French.

When you perform a proximity search, you can restrict your search to a predefined list of records. For example, you might create a list of contacts that have the Partner contact type and then perform a proximity search on that list to find the partner contacts that are located no more than 10 miles from your current location or a location where you plan to be tomorrow.

The following table shows the pins that appear on the map.

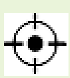
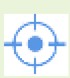
Pin	Purpose
	Indicates your current location, if the maps functionality can determine your location
	Indicates the location of an address that is found in a proximity search
	Indicates the center of a proximity search

If your current location can be determined, then a pin indicates your location on the map that appears when you open the Maps page. If your current location cannot be determined, then a map of North America is shown. The maps functionality determines your current location as follows:

- If the computer that you are using receives global positioning system (GPS) information, then the maps functionality uses the GPS information to determine your current location.
- If your computer does not receive GPS information, then the maps functionality uses the application programming interfaces (API) of your browser to determine your current location. The APIs use the IP address of your computer to determine your current location. If your computer points to a proxy server, then the location of the proxy server is shown as your current location.

  NOTE: If you want your current location to be determined, then you must allow your browser to access your current location information. Depending on the browser that you use and the privacy settings that you select on the browser, you might be prompted to allow your browser to access your current location information. If you do not agree, then the default map of North America is shown instead of your current location.

  In addition, the following table shows the target icons available on a map.

Icon	Purpose
	This icon is displayed when the page is not centered on your current location. Hovering over this icon displays *Show My Location.*
	This icon is displayed only when the page is centered on your current location. Hovering over this icon displays *My Location.* Clicking this icon adjusts the magnification of the map to center the location pin on the map.

If multiple records are plotted or pinned on the same latitude and longitude, then Oracle CRM On Demand displays a single pin for all of these records. Clicking the pin displays a list of all underlying record names and their associated addresses. You can select any record from this list to add the address to directions, or to set the address as a proximity center. For more information on getting direction information, see Obtaining Driving Directions (on page 367), and for more information on proximity searches, see Performing Proximity Searches (on page 364).

For information on the data coverage provided by Oracle CRM On Demand's mapping and geocoding functionality, see Mapping and Geocoding Data Coverage (on page 369).

Related Topics

See the following topics for related information:

- Finding Addresses on Maps (on page 364)

- Performing Proximity Searches (on page 364)
- Obtaining Driving Directions (on page 367)
- Accessing a Map for an Address (on page 351)

Finding Addresses on Maps

This topic describes how to find addresses in the Maps page in Oracle CRM On Demand.

NOTE: If your current location can be determined, then a pin indicates your location on the map that appears when you open the Maps page. If your current location cannot be determined, then a map of North America is shown.

Before you begin. To use the Maps page, you must have the Maps Integration privilege in your user role. In addition, your administrator must make the Maps tab available for your user role. If the Maps tab is not present in the tabs across the top of your pages in Oracle CRM On Demand after your administrator makes the Maps tab available to your user role, then you can add the Maps tab to your tab layout. For information about adding tabs to your tab layout, see Displaying Your Tabs (on page 749).

To find an address on a map

1. Click the Maps tab.
2. In the Maps page, in the search pane, type in the address that you want to find.

   You must use commas to separate the elements of the address, and you must enter the country name or code as the last element in the address. The format of the address can vary depending on the country. Searches are not case-sensitive. The following are some examples of how you might enter an address:

   - Avenida Vitacura 2939 Piso 6, Las Condes, Santiago, Chile
   - 5805 Owens Drive, Pleasanton, CA 94588, USA
   - Unit 6, IDA Business Park, Dangan, Galway, IE
   - Leela Infopark, 10th Floor, technopark campus, Plot No. 02, Kariavattom P.O., Trivandrum, KL 695581, In

   You can also enter the name of a city and a country. In this case, the Maps functionality returns the default street address for that city and country. For multiple matches, the search displays the available matching addresses that it finds and prompts you to select one of the addresses. For example, if you enter the string *Toronto, Canada* in English, then the search returns two addresses. One is the default address for Toronto in Prince Edward Island, and the other is the default address for Toronto in Ontario, both of which are in Canada. Oracle Maps provides the addresses.
3. Click the magnifying glass icon.

   On the map, a pin indicates the location of the address. If more than one match is found for your search criteria, then the matches are shown in a list and you can select the correct match. Up to 10 matches are listed initially. If more than 10 matches are found, then you can scroll to see additional matches.

Related Topics

See the following topics for related information:

- Maps (on page 362)
- Performing Proximity Searches (on page 364)
- Obtaining Driving Directions (on page 367)

Performing Proximity Searches

In a proximity search, Oracle CRM On Demand checks the addresses that are stored on records of a given record type to determine whether the addresses are within the radius that you specify for the search. If Oracle CRM On Demand finds an address that is within the radius of the search, then a pin is placed on the map to indicate the address location. You can see the name and address of the record that is associated with a pin when you rest your pointer on the pin.

Proximity searches are based on the information in the Latitude and Longitude fields in the addresses that are searched. Therefore, you must ensure that these fields are populated correctly in the relevant addresses if you want the addresses to be found by a proximity search. For more information about the Latitude and Longitude fields, see About Geocode Fields in the Address Record Type (on page 354).

The following table lists the record types that support proximity searches and shows the address type that is checked on each record type when you perform a proximity search.

Supported Record Type	Address Checked in Proximity Searches
Account	The shipping or billing address for the account
Activity	The address in the Address field on the activity, for example, the address in a contact call.
Contact	The primary address for the contact

NOTE: If your current location can be determined, then a pin indicates your location on the map that appears when you open the Maps page. If your current location cannot be determined, then a map of North America is shown.

After you have performed a proximity search on a supported record type, you can navigate to the record's Detail page or just preview the record's Detail page depending on the value of the Record Preview Mode setting. This setting is typically set up for your company in the company profile by your administrator, however, you can override the company-wide setting in your personal profile under My Setup.

NOTE: The record preview functionality is not available if you access Oracle CRM On Demand through a device running the iOS operating system.

Before you begin. To use the Maps page, you must have the Maps Integration privilege in your user role. In addition, your administrator must make the Maps tab available for your user role. If the Maps tab is not present in the tabs across the top of your pages in Oracle CRM On Demand after your administrator makes the Maps tab available to your user role, then you can add the Maps tab to your tab layout. For information about adding tabs to your tab layout, see Displaying Your Tabs (on page 749).

The following procedure describes how to perform a proximity search to find accounts or contacts that are located within a specified radius of your current location.

NOTE: A proximity search returns the location of the first 500 records that are within the specified radius.

To perform a proximity search within a specified radius of your current location

1. Click the Maps tab.
2. In the Maps page, in the search pane, click the double arrows to show the search criteria fields in the Around Me tab.
3. In the Around Me tab of the search pane, enter the criteria for your search, and then click the magnifying glass icon.

   NOTE: You can find information about the search criteria fields in the table at the end of this topic.

   Pins appear on the map to indicate the locations of the addresses that are found within the specified radius.
4. To see the name and address of the record that is associated with a pin in the map pane, rest your pointer on the pin.

5 To clear the results of the proximity search plotted as pins on the map, click Clear Results at the bottom of the Around Me tab.

The following procedure describes how to perform a proximity search within a specified radius of a location that you select.

NOTE: If you want to use a specific address as the center for your proximity search, and if that address is not already indicated by a pin on the map, then search for the address before you perform your proximity search. For more information, see Finding Addresses on Maps (on page 364).

To perform a proximity search within a specified radius of a location that you select

1 In the Maps page, on the map, set the center for your proximity search.

   Do one of the following:

   - On the map, click a pin that indicates the address that you want to use as the center for your proximity search, and then click Set as Proximity Center.
   - On the map, right-click any location that you want to use as the center for your proximity search, and then click Set as Proximity Center.

   NOTE: If the address that you want to use as the center for your proximity search is not already shown on the map, then search for it, as described in Finding Addresses on Maps (on page 364).

   The center that you set for the proximity search is indicated by a pin.

2 In the search pane, if the search criteria fields in the Around Me tab are not visible, then click the double arrows to show the fields.

3 In the Around Me tab of the search pane, enter the criteria for your search, and then click the magnifying glass icon.

   Pins appear on the map to indicate the locations of the addresses that are found within the specified radius.

4 To see the name and address of the record that is associated with a pin in the map pane, rest your pointer on the pin.

5 To clear the results of the proximity search plotted as pins on the map, click Clear Results at the bottom of the Around Me tab.

The following table describes the criteria fields for a proximity search.

Search Criteria Field	Description
Select Record Type	Select the record type that you want to search for, such as Account, Activity, or Contact. This field is required for a proximity search.
Address Type	This picklist applies only for an account proximity search, and can have the following values: ■ **Shipping Address.** The proximity search for the account is limited to the shipping address. ■ **Billing Address.** The proximity search for the account is limited to the billing address. This is the default value.
Select List	Select the list that you want to search. All of the lists that are available to you for the record type are available for you to select in this field.

Search Criteria Field	Description
Radius	Select the radius for the proximity search. The available options are 1, 5, 10, 20, 25, 50, 100, and 500. If you do not select a value, then a default value of 10 is used for the search.
Units	Select the units in which the radius is measured. The available options are miles and kilometers.

To preview a record after a proximity search

1. Click the desired pin that is available from the proximity search for an account, activity, or a contact record.
2. Preview the record as follows:
   a. If the Record Preview Mode is set to Click On Preview Icon, then you can hover your mouse over the name of the record to display the preview icon, and then click the icon to display the first section of the record's Detail page.
   b. If the Record Preview Mode is set to Hover on Link, then you can hover your mouse over the link for the name of the record to display the first section of the record's Detail page.
3. Click the link for the name of the record in the record preview to open the record's Detail page.

   NOTE: You can also open the record's Detail Page from the link for the name of the record on the initial pop-up window as well as from the preview pop-up window.

4. To return to the map, click Back to Maps on the record's Detail page.

   NOTE: Oracle CRM On Demand saves the results of your prior proximity search.

Related Topics

See the following topics for related information:

- Maps (on page 362)
- Finding Addresses on Maps (on page 364)
- Obtaining Driving Directions (on page 367)

Obtaining Driving Directions

This topic describes how to obtain driving directions to addresses on the Maps page in Oracle CRM On Demand.

NOTE: If your current location can be determined, then a pin indicates your location on the map that appears when you open the Maps page. If your current location cannot be determined, then a map of North America is shown.

Before you begin. To use the Maps page, you must have the Maps Integration privilege in your user role. In addition, your administrator must make the Maps tab available for your user role. If the Maps tab is not present in the tabs across the top of your pages in Oracle CRM On Demand after your administrator makes the Maps tab available to your user role, then you can add the Maps tab to your tab layout. For information about adding tabs to your tab layout, see Displaying Your Tabs (on page 749).

To obtain driving directions

1. Click the Maps tab.
2. Add a starting point and destination for the driving directions, also known as the start point and stop point, using one of the following methods on the Maps page:

- In the search pane, click the double arrows, and in the Directions tab, enter the address for the start point in the field labeled A, and then enter the address for the destination or stop point in the field labeled B.

  You must use commas to separate the elements of the address, and you must enter the country name or code as the last element in the address. The format of the address can vary depending on the country.

  For a list of countries and their two-letter country codes that are supported by Oracle Maps, see the Oracle Maps Geocoder Metadata Web page. For more information on the address formats supported by Oracle Maps, see the Oracle Maps Geocoder Concepts Web page.
- Right-click the starting location on the map, and then select Add to Directions to add the start point to the field labeled A in the Directions tab. Then right-click the destination location, and select Add to Directions to add the stop point to the field labeled B.
- Click a pin on the map, and select Add to Directions to add the start point in the field labeled A in the Directions tab. Then click the destination pin, and select Add to Directions to add the stop point to the field labeled B.

You can mix and match these methods to add start and stop points as required.

NOTE: If you enter an address in the search field in the search pane, and if a start point (A) and stop point (B) exist in the Directions tab, then the address is added as a stop point (C) when you perform the search.

3 Click the magnifying glass icon.

In the Directions tab, Oracle CRM On Demand starts the driving directions. The directions, or route card, provide the possible driving routes and include the estimated time and distance for each route, similar to the driving directions information from commercially available Global Positioning Systems. Oracle CRM On Demand also plots the destination labels and route on the map.

If you enter multiple destination stop points, for example, start point A with stop points B and C, then the driving information includes the directions from start point A to stop point B, and then from stop point B to stop point C. If you want to obtain directions from your current location to a stop point, then include your current location as the start point by clicking the My Location pin, and then clicking Add to Directions.

NOTE: The driving directions are based on the closest street information for the address available from Oracle Maps. Consequently, the stop point labels might not be pinned to the exact address on the map.

4 To center a stop point in your map view, click the stop point label, for example B, C, and so on, in the route card.

Centering the stop point in your view is only functional if the route is displayed on the map. If you clear the route by clicking the x icon in the route card or by altering the stop points, or if you have not clicked the magnifying glass after entering the stop points, then the map will not center on the stop points.

5 To clear the results obtained for the driving directions, click x in the route card.

The route is also cleared if you alter the existing stop points, for example, if you edit a stop point, remove a stop point, or reverse the order of the stop points.

6 To print the driving directions, click the Printer icon on the driving results card:

The print preview window that opens displays a snapshot of the map with driving directions. The preview includes all stop points, the stop point addresses, the time and distance summary for the trip, and the map showing all available routes. Following the map image is a table of driving directions with the estimated driving time. The stop points in the table are color coded to match the stop point pin color on the map.

In addition, the options described in the following table are available as links in the bottom of the Directions tab.

Option	Description
Add Stop-Point	Select this option to add more destination stop points, up to a maximum of four stop points. A start point and a stop point are available by default.

Option	Description
More Options	Select this option to specify additional preferences for the driving directions, such as: - **Route preference.** Fastest or shortest. Fastest is the default. - **Road preference.** Highway or local roads. Highway is the default. - **Distance units.** Imperial or metric. Imperial is the default. - **Language.** Available languages for driving directions are English, French, German, Italian, and Spanish. English is the default.
Reverse Addresses	Select this option to reverse the order of the start and stop points in the route card.

Related Topics

See the following topics for related information:

- Maps (on page 362)
- Finding Addresses on Maps (on page 364)
- Performing Proximity Searches (on page 364)

Mapping and Geocoding Data Coverage

The underlying mapping and geocoding functionality for Oracle CRM On Demand is provided by Oracle Spatial and Graph. The following table shows the data coverage provided by Oracle Spatial and Graph.

Area	Country or Territory
North America	Bahamas, Belize, Bermuda, Canada, Cayman Islands, Costa Rica, Cuba, Dominican Republic, El Salvador, Guatemala, Honduras, Jamaica, Mexico, Nicaragua, Panama, Puerto Rico, US Virgin Islands, United States
Europe	Albania, Andorra, Austria, Azerbaijan, Belarus, Belgium, Bosnia and Herzegovina, British Sovereign Base Areas, Bulgaria, Channel Islands, Croatia, Cyprus, Cyprus UN Neutral Zone, Czech Republic, Denmark, England, Estonia, Former Yugoslav Republic of Macedonia, Finland, France, Georgia, Germany, Gibraltar, Greece, Hungary, Iceland, Ireland, Isle of Man, Italy, Kazakhstan, Kosovo, Kyrgyzstan, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Moldova, Monaco, Montenegro, Netherlands, Northern Ireland, Norway, Poland, Portugal, Romania, Russia, San Marino, Scotland, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Turkish-Cypriot Administered Area, Ukraine, Uzbekistan, Vatican City, Wales
Asia Pacific	Australia, Bangladesh, Brunei Darussalam, Cambodia, Hong Kong-China, India, Indonesia, Macau-China, Malaysia, Maldives, Mongolia, Nepal, New Zealand, Philippines, Singapore, Sri Lanka, Taiwan, Thailand, Vietnam

Area	Country or Territory
South America	Argentina, Aruba, Barbados, Bolivia, Brazil, Chile, Colombia, Ecuador, Falkland Islands, French Guiana, Guadeloupe, Guyana, Martinique, Paraguay, Peru, Saint Barthelemy, Saint Kitts and Nevis, Saint Vincent and the Grenadines, South Georgia and South Sandwich Islands, Suriname, Trinidad and Tobago, Uruguay, Venezuela
Middle East and Africa	Angola, Bahrain, Benin, Botswana, Burundi, Egypt, Eswatini, Gaza Strip, Ghana, Guinea, Iraq, Israel, Ivory Coast, Jordan, Kenya, Kuwait, Lebanon, Lesotho, Malawi, Mali, Morocco, Mozambique, Namibia, Niger, Nigeria, Oman, Qatar, Reunion, Rwanda, Saudi Arabia, Senegal, South Africa, St Helena, Ascension and Tristan da Cunha, Tanzania, Togo, Tunisia, Uganda, United Arab Emirates, Zambia, Zimbabwe

NOTE: Any countries that are not listed in the table only have limited mapping layers provided by the Nokia World Map product. South Korea’s data must be hosted in country and currently there is no deployment date.

Related Topics

See the following topics for related information:

- Maps (on page 362)
- Finding Addresses on Maps (on page 364)
- Performing Proximity Searches (on page 364)
- Obtaining Driving Directions (on page 367)
- Accessing a Map for an Address (on page 351)

5 Business Planning

This topic introduces the Business Planning features available with Oracle CRM On Demand.

About Business Planning

Oracle CRM On Demand supports the management of accounts and contacts. This management includes handling the profiles of the account and related contacts, the account and contact relationships, and creating an overall plan for how to effectively allocate funding and resources associated with an account.

As sales and marketing teams move from a product-centered strategy to an account-based (or customer-based) sales strategy, key account selling and strategic business planning become critical for success. Sales and marketing teams define the following:

- Potential opportunities for the business
- Strategic goals
- Lists of defined activities to meet these goals and win opportunities
- Strategic goals for an entire account
- Tangible goals with the appropriate definition of the potential opportunity

Oracle CRM On Demand supports selling strategies and processes to manage your key accounts that enable your account teams to create and manage the following:

- Business and engagement plans
- Related objectives
- Opportunities
- Activities

NOTE: The Business Plan, Objective, Plan Account, Plan Contact, and Plan Opportunity functionality was developed in the context of Oracle CRM On Demand Life Sciences Edition, however, all Oracle CRM On Demand customers can access and use this functionality. Your company administrator can enable this functionality for your use.

Scenarios for Business Planning

The following topics provide examples of how Oracle CRM On Demand business planning functionality might be used. You might use this functionality differently, depending on your business model.

- Scenario for Managing Plans for a Single Account (on page 372) (Account Centric)
- Scenario for Managing Plans for a Group of Accounts or Territories (on page 372) (Account Centric)
- Scenario for Managing Plans for Contacts (on page 373) (Contact Centric)
- Scenario for Managing Plans for Objectives and Products (on page 374) (Product Centric)

Scenario for Managing Plans for a Single Account

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use the Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, an account manager is responsible for managing plans for single accounts. The account manager uses sophisticated functions to manage large and complex accounts (for example, a multinational company) compared with a simple account (such as a home-based business). Such an account has multiple plans for different periods or even within the same period for different account managers. For example, a general account manager or a special products account manager might have different plans.

The account manager performs the following tasks to manage the plans for an account:

1. Before the planning period, the account manager creates a business plan for each account. The plan establishes the high-level quantitative and qualitative goals for the account for the associated period. An annual plan and child quarterly plans are usually available, particularly for important accounts. The key metric for the business plan is revenue. Typically, a plan for a large customer contains child plans for different operating units and territories, and so on, but all plans are managed as one account. For information on how to set up a business plan, see Business Plans (on page 375).
2. In the approval process for the business plan, the account manager changes the status of the plan from Draft to Submitted. Other key personnel review and edit the plan. The account manager approves the plan, changing the status to Final Approved. At the end of the planning period, the account manager can change the status to Expired to reduce the number of active plans.
3. The account manager completes additional details of the business plan; that is, the objectives. Objectives are goals that are at a lower level in the plan. For example, an objective might be to conduct a certain number of sales calls. The account manager can associate specific activities and opportunities with either a business plan or an objective. For information on how to set up an objective, see Objectives (on page 380).
4. As sales opportunities arise, the account manager enters the opportunities, associating them with either the plan or objective. For information on how to set up opportunities, see Opportunities (on page 309).

While performing the planning activities, the account manager can do the following:

- View plans, objectives, opportunities, and activities that are explicitly associated with an account and any associated account contacts
- View any objectives that apply to all accounts
- Review existing activities continuously, and create follow-up activities and opportunities

Scenario for Managing Plans for a Group of Accounts or Territories

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, which is a variation of Scenario for Managing Plans for a Single Account (on page 372), an account manager or sales manager performs the business planning for groups of accounts. Examples of these groups of accounts include an account manager's entire territory, a *brick* (a collection of accounts and contacts, normally in a common geographic area), a larger region, a market channel or segment, or a group of small accounts that do not warrant individual plans. Typically, the users performing the Scenario for Managing Plans for a Single Account (on page 372) also perform this scenario.

The account manager or sales manager performs the following tasks to manage plans for the group of accounts or territory:

1. Before the planning period, the account manager creates a business plan for each account. The plan establishes the high-level quantitative and qualitative goals for the account for the associated period. Typically, an annual plan and child quarterly plans are available, particularly for important accounts. The key metric for the business plan is revenue. Typically, there are always quarterly child plans and perhaps monthly child plans for lower-level planning. Certain fields, such as Contacts, might be left empty. Plans might exist at multiple levels of the hierarchy, such as territory, region, country, which can be created by recursive relationships in the Business Plan record type. The account manager creates the highest-level plan first, so that other personnel can create child plans below the parent in the hierarchy. For information on how to set up a business plan, see Business Plans (on page 375).
2. In the approval process for the business plan, the account manager changes status of the plan from Draft to Submitted. Other key personnel review and edit the plan. The account manager approves the plan, changing the status to Final Approved. At the end of the planning period, the account manager can change the status to Expired to reduce the number of active plans.
3. The account manager completes the details of the business plan, namely the objectives. Objectives are goals that are at a lower level in the plan. For example, an objective might be to conduct a certain number of sales calls. The account manager can associate specific activities and opportunities with either a business plan or an objective. For information on how to set up an objective, see Objectives (on page 380).

While performing the planning activities, the account manager can do the following:

- View plans, objectives, opportunities, and activities that are explicitly associated with an account and any associated account contacts.
- View any objectives that apply to all accounts.
- Review existing activities continuously, and create follow-up activities.

Scenario for Managing Plans for Contacts

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, an account manager is responsible for managing plans for contacts, independent of the contact's relationship to an account. For example, the contact is a key opinion leader, a consultant, or researcher whose influence goes beyond the associated accounts.

The account manager or industry liaison performs the following tasks to manage the plan for a contact:

1. The account manager creates a business plan for each contact, prior to the planning period. The plan establishes the high-level goals for the contact for the associated period. An annual plan and typically child quarterly plans are available, particularly for important contacts.

   Goal-related fields are likely to be qualitative targets rather than revenue targets. It is unlikely that any type of hierarchy exists, which is similar to the hierarchy of account plans that correspond to the overall account, operating units, and so on. For information on how to set up a business plan, see Business Plans (on page 375).
2. In the approval process for the business plan, the account manager changes the status of the plan from Draft to Submitted. Other key personnel review and edit the plan. The account manager approves the plan, changing the status to Final Approved. At the end of the planning period, the account manager can change the status to Expired to reduce the number of active plans.
3. The account manager completes the objectives. Objectives are goals that are at a lower level in the plan. For example, an objective can be to deliver a certain number of academic presentations. The account manager can associate specific activities and opportunities with either a business plan or an objective. For information on how to set up an objective, see Objectives (on page 380).

4. As opportunities arise (for example, an opportunity to deliver a lecture or fund research), the account manager enters the opportunities, associating them with either the plan or objective. For information on how to set up opportunities, see Opportunities (on page 309).

While performing the planning activities, the account manager can do the following:

- View plans, objectives, opportunities, and activities that are explicitly associated with a contact and associated accounts.
- View any objectives that apply to all contacts.
- Review existing activities continuously, and create follow-up activities and opportunities.

Scenario for Managing Plans for Objectives and Products

This scenario gives one example of how Oracle CRM On Demand business planning functionality might be used. You might use Oracle CRM On Demand business planning functionality differently, depending on your business model.

In this scenario, an account manager is responsible for managing business plans that focus on plans, objectives, and products. The plans might be applied to a broad group of accounts. For example, for a strategic product launch, senior sales or marketing management creates business plans and objectives that are applied to all accounts (or a relevant subset), regardless of the specific detail in the individual account plans.

The senior sales management or marketing management with senior sales management approval typically perform the following tasks to manage the plan. How they manage the plan depends on how their organization implements access controls.

1. At the beginning of the annual and quarterly planning periods, the marketing manager creates the business plans for some product marketing initiatives. While the marketing organization might have a separate system for comprehensive, product-business planning, its use in this scenario is for high-priority initiatives that require special attention from the sales team. The business plans establish high-level quantitative and qualitative goals during the associated period. There might be an annual plan and child quarterly plans. The key metrics for the business plans typically include revenue. For information on how to set up a business plan, see Business Plans (on page 375).
2. The marketing manager might change the status of the business plans from Draft to Submitted. The required managers review, edit, and approve plans by changing the status to Final Approved. At the end of the planning period, the marketing manager changes the status of the plan to Expired to reduce the number of inactive plans.
3. The marketing manager adds more details to the plan, namely the objectives. Objectives are goals that are at a lower level in the plan, for example, activate sampling, or perform activities: make specific calls, visits, and so on. The marketing manager can associate the activities with either the business plan or the objectives. For information on how to set up an objective, see Objectives (on page 380).
4. The marketing manager applies the plan or objective to a group of accounts. The plan can apply to all accounts or a subset of accounts that are relevant to a particular product. The marketing manager attaches the business plan or objective to each relevant account. The account manager executes and evaluates the business plan or objective.
5. As sales opportunities arise, the account or marketing manager enters the opportunities, associating them with either the plan or objective. For information on how to set up opportunities, see Opportunities (on page 309).

While performing the planning activities, the account or marketing manager can do the following:

- View plans, objectives, opportunities, and activities that are explicitly associated with an account and any associated account contacts.
- View any objectives that apply to all accounts.
- Review existing activities continuously, and create follow-up activities and opportunities.

Business Plans

Use the Business Plan pages to create, update, and track business plans for accounts, contacts, or products. A *business plan* allows sales organizations to set strategic goals (for example, revenue targets) and action plans to achieve those goals, in the form of objectives, activities, and opportunities.

You can use business plans in a number of ways to accommodate company-specific planning processes. For example, you can create plans for individual accounts (for example, at the headquarters or territory level), or for a number of accounts (for example, all accounts in a sales representative's territory). You can create plans for contacts independent of their account affiliation, which is useful for managing relationships with key-opinion leaders, whose influence in an industry or field extends beyond their own account affiliation (for example, an influential medical researcher). You can create plans for products, for instance, to plan the launch of a new product that will be sold to multiple accounts. For all these business plan types, the planning horizon can be short or long term. The business plan type is based on company-defined planning periods, typically months, quarters, and years.

Users can create hierarchies of business plans. A given business plan can have multiple child plans. Furthermore, a given plan can have associated objectives (for more information on objectives, see Objectives (on page 380)). A business plan sets high-level strategic goals, such as a revenue target. However, an objective sets a tactical goal, such as completing a number of sales calls, or attaining a certain number of new prescriptions at a medical practice.

Using business plans, you can integrate customer relationship management with business-planning tasks, workflows, and deliverables during the business-planning life cycle. By supporting the creation and management of account plans, a business plan supports selling to accounts and managing sales. A business plan consists of some general, plan information, and includes related plan objectives, opportunities, and activities. This plan information is also related to accounts because a business plan can be created for one account, for example, an account group parent and applied to a number of other accounts in a group.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking business plan information, the Business Plan tab might be excluded from your setup.

Working with the Business Plan Homepage

The Business Plan Homepage is the starting point for managing business plans.

NOTE: Your company administrator can customize the layout of your Business Plan Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Business Plan

You can create a new business plan by clicking the New button in the Recently Viewed Business Plans section. For more information, see Creating Records (on page 51) and Business Plan Fields (on page 378).

Working with Business Plan Lists

The Business Plan Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for business plans.

Business Plan List	Filters
All Business Plans	All business plans to which you have visibility, regardless of who owns the business plan.

Business Plan List	Filters
Recently Modified Business Plans	All business plans with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Business Plans

The Recently Modified Business Plans section shows the business plans that you viewed most recently.

Click Show Full List to expand the list.

Adding Sections to your Business Plan Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Business Plan Homepage:

- Recently Created Business Plans
- Recently Modified Business Plans
- My Recently Created Business Plans
- My Recently Modified Business Plans
- Additional report sections (Your company administrator can make report sections available for display on your Business Plan Homepage.)

To add sections to your Business Plan Homepage

1. On the Business Plan Homepage, click Edit Layout.
2. On the Business Plan Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about business plans:

- Business Plans (on page 375)
- Business Plan Fields (on page 378)
- Managing Business Plans (on page 376)

Managing Business Plans

For step-by-step procedures for managing business plans, see:

- Linking Records to Business Plans (on page 377)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Using Assessment Scripts (on page 168)

- Sharing Records (Teams) (on page 146)
- Working with Attachments (on page 161)
- Viewing Audit Trails for Records (on page 175)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Business Plan pages, you must have the following privileges in your user role:

- Manage Business Planning Access
- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account
- Plan Contact
- Plan Opportunity

Related Topics

See the following topics for related information about business plans:

- Business Plans (on page 375)
- Working with the Business Plan Homepage (on page 375)
- Business Plan Fields (on page 378)

Linking Records to Business Plans

You can link additional records to the business plan by adding sections to the Detail Page for the business plan record:

- Plan Accounts
- Plan Contacts
- Business Plans
- Objectives
- Plan Opportunities
- Activities

NOTE: A particular business plan can relate to multiple items of all the above entities. The entities prefaced with the term, *Plan,* are special entities that allow many-to-many relationships. A business plan, objective, or activity can relate to only one parent business plan. However, a plan account, plan contact, or plan opportunity allows multiple parent business plans. Allowing multiple parent plans accommodates the required flexibility in relating these entities to business plans.

For more information, see Changing Your Detail Page Layout (on page 749).

To link records to a business plan

1 On the Business Plan Detail page, click Edit Layout.

2 On the Business Plan Detail Layout page, click the arrows to add the section for the record, and to organize the sections on the page.

3 Click Save.

Business Plan Fields

Use the Business Plan Edit page to add a business plan, or update details for an existing business plan. The Business Plan Edit page shows the complete set of fields for a business plan.

TIP: You can also edit business plans on the Business Plan List page and the Business Plan Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Business Plan fields.

Field	Description
Key Plan Information	
Plan Name	The name of the business plan. (Required.)
Period	Specifies the period during which to complete the business plan. A planning period follows your company's fiscal calendar definition, as determined by your company administrator. A period can correspond to a fiscal year, quarter, month, or week, for example, Fiscal Quarter 1 2010. The available periods listed are based upon your company's defined fiscal calendar. For more information on defining fiscal calendars, see About Fiscal Calendars (on page 1161). **NOTE:** You require the Manage Period Administration privilege to select a period.
Period: Start Date	The starting date of a period. Click the Calendar icon to select the start date.
Period: End Date	The ending date of a period. Click the Calendar icon to select the end date.
Type	The business plan type. Choose the applicable type of business plan from the drop-down list. Example plan types are: Account, Local, Regional, National, Market Segment, Engagement, or Brand. (Required.)
Status	The business plan status. Choose the current status of the business plan from the drop-down list. Examples of the plan status are: Draft, Submitted, Final Approved, Current, Expired, Future, On Hold. (Required.)
Owner	The owner of the business plan record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	The description of the business plan.

Field	Description
Product Name	The name of the product associated with this plan. Click the Lookup icon to choose a product.
Plan Revenue	The expected revenue associated with this plan.
Currency	The currency for any monetary amounts in this plan.
Exchange Date	The relevant date for converting any local revenue amounts to currencies used at headquarters.
Account	The account associated with this business plan. Click the Lookup icon to choose an account. This field can be used in the case of a one-to-one relationship between the business plan and a specific account. If the business plan has more than one account associated with it, then use the intersection entity Plan Accounts to form the relationship. **NOTE:** The Account field is not available by default. To add this field to the Business Plan Detail page, contact your company administrator.
SWOT Analysis	
Strengths	Competitive strengths with respect to achieving this plan. (This field has a limit of 240 characters.)
Weakness	Competitive weaknesses with respect to achieving this plan. (This field has a limit of 240 characters.)
Opportunities	Potential business opportunities associated with this plan. (This field has a limit of 240 characters.)
Threats	Potential threats that might limit business opportunities associated with this plan. (This field has a limit of 240 characters.)
NOTE: The following fields are available with Oracle CRM On Demand Partner Relationship Management Edition and might not be available for your configuration. If these fields are not available, contact your administrator.	
Owner Partner Account	The name of the Partner Account to which the owner of the business plan belongs.
Originating Partner Account	The name of the Partner Account that originated the business plan.
Principal Partner Account	The name of the Partner Account that is leading the effort on the business plan.

Related Topics

See the following topics for related information for business plans:

- Business Plans (on page 375)
- Working with the Business Plan Homepage (on page 375)

- Managing Business Plans (on page 376)

Objectives

Use the Objective pages to create, update, and track objectives for a business plan.

An *objective* is a tactical goal that you want to achieve, to attain a higher-level strategic goal in a business plan. Typically, you create an objective that is related to a business plan. While a business plan might establish an overall annual revenue goal for an account, an objective establishes a tactical goal, such as completing a number of sales calls, or attaining a certain number of new prescriptions at a medical practice. Objectives provide an intermediate level of planning, between setting high-level strategic goals with business plans, and low-level planning with activities (individual sales visits and calls) and opportunities (individual sales deals).

An objective does not have to be subsidiary to a business plan. Organizations can choose to use objectives differently. Like business plans, you can apply objectives to accounts, contacts, or products. A given objective can have multiple child objectives. You can set objectives for the short-term or long-term periods. The periods are based on company-defined planning periods, which are typically months, quarters, or years. Objectives are not as flexible as business plans. While a business plan can relate to multiple accounts and contacts, an objective can relate to only one account and one contact. In addition, while an opportunity can relate to multiple business plans, an opportunity can relate to only one objective.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking objectives, then the Objective tab might be excluded from your setup.

Working with the Objective Homepage

The Objective Homepage is the starting point for managing objective records.

NOTE: Your company administrator can customize the layout of your Objective Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an Objective

You can create a new objective by clicking the New button in the Recently Modified Objectives section. For more information, see Creating Records (on page 51) and Objective Fields (on page 382).

Working with Objective Lists

The Objective Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for objectives.

Objective List	Filters
All Objectives	All objectives to which you have visibility, regardless of who owns the objective.
Recently Modified Objectives	All objectives with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Objectives

The Recently Modified Objectives section shows the objectives that you modified most recently.

Click the Show Full List link to expand the list.

Adding Sections to Your Objective Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Objective Homepage:

- Recently Created Objectives
- Recently Modified Objectives
- My Recently Created Objectives
- My Recently Modified Objectives
- Additional report sections (Your company administrator can make report sections available for display on your Objective Homepage.)

To add sections to your Objective Homepage

1. On the Objective Homepage, click Edit Layout.
2. On the Objective Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Objectives

For step-by-step procedures for managing objectives, see:

- Linking Records to Objectives (on page 382)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Using Assessment Scripts (on page 168)
- Sharing Records (Teams) (on page 146)
- Working with Attachments (on page 161)
- Viewing Audit Trails for Records (on page 175)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Objective pages, you must have the following privileges in your user role:

- Manage Business Planning Access
- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account
- Plan Contact
- Plan Opportunity

Related Topics

See the following topics for related information on objectives:

- Objectives (on page 380)
- Working with the Objective Homepage (on page 380)
- Objective Fields (on page 382)

Linking Records to Objectives

You can also link the following records to an objective by adding sections to the Detail Page for the objective record:

- Objectives
- Opportunities
- Activities

For more information, see Changing Your Detail Page Layout (on page 749).

To link records to an objective

1. On the Objective Detail page, click Edit Layout.
2. On the Objective Detail Layout page, click the arrows to add the section for the record, and to organize the sections on the page.
3. Click Save.

Objective Fields

Use the Objective Edit page to add an objective, or update details for an existing objective. The Objective Edit page shows the complete set of fields for an objective.

TIP: You can also edit objectives on the Objective List page and the Objective Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some of the objective fields.

Field	Description
Key Objective Information	
Objective Name	The name of the objective. (Required.)
Plan Name	The parent business plan associated with this objective. Select the business plan, using the Lookup icon.

Field	Description
Type	The general purpose of the objective. Examples are: Awareness, Education, Relationship, New account acquisition, Increase account penetration, Product trial, Special incentive, Account retention, and Competitive response. Select the type from the drop-down list. (Required.)
Status	The current status of the objective. Examples are: Draft, Submitted, Final Approved, Current, Expired, Future, and On Hold. Select the status from the drop-down list. (Required.)
Account Name	The account associated with this objective. Click the Lookup icon to select the account.
Contact Name	The contact associated with this objective. Click the Lookup icon to select the contact.
Product Name	The product associated with this objective. Click the Lookup icon to select the product.
Period	A period defines the time within which to complete an objective. A period objective is determined by your company's fiscal calendar definition, which your company administrator defines. (Required.) A period can correspond to a fiscal year, quarter, month, or week, for example, Fiscal Quarter 1, 2010. The available periods listed are based upon your company's defined fiscal calendar. For more information on defining fiscal calendars, see About Fiscal Calendars (on page 1161). **NOTE:** You require the Manage Period Administration privilege to select a period.
Period: Start Date	The starting date of a period. Click the Calendar icon to select the start date.
Period: End Date	The ending date of a period. Click the Calendar icon to select the end date.
Target Information	
Objective Revenue	The revenue target for this objective, for example 1,000,000.
Currency	The currency for the revenue (for example, USD or EURO). Click the currency icon to choose your required currency.
Exchange Date	The relevant date for converting local revenue into currencies that headquarters use.
Target Audience	The target group or organization for this objective, for example, physician practices specializing in cardiology.
Objective Target	The goal or outcome for this objective, expressed in objective units, for example, 1000 to represent 1000 customer calls.

Field	Description
Objective Units	The unit of expression for the objective target, for example, Sales Units, Number of Calls, dollars ($), and so on. Click the drop-down list to select the objective unit.
Additional Information	
Description	The description of the objective.
Owner	The owner of the objective record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Related Topics

See the following topics for related information about objectives:

- Objectives (on page 380)
- Working with the Objective Homepage (on page 380)
- Managing Objectives (on page 381)

Plan Accounts

Use the Plan Account pages to create, update, and track plan accounts that are associated with business plans. A *plan account* maps accounts and business plans, in other words, you use plan accounts to associate accounts with business plans. A plan account allows an account to have multiple business plans (for example, one for a general sales force and one for a specialty sales force). However, a business plan covers multiple accounts (for example, all accounts in a territory).

It is possible that some users might not interact directly with the plan account record type. Instead, they associate accounts with business plans from the Business Plan Detail Page or from the Account Detail Page. Some users might prefer to work directly with the plan account record type.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking plan account information, the Plan Account tab might be excluded from your setup.

Working with the Plan Account Homepage

The Plan Account Homepage is the starting point for managing plan accounts.

NOTE: Your company administrator can customize the layout of your Plan Account Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Plan Account

You can create a new plan account by clicking the New button in the Recently Modified Plan Accounts section. For more information, see Creating Records (on page 51) and Plan Account Fields (on page 386).

Working with Plan Account Lists

The Plan Accounts Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for plan accounts.

Plan Account List	Filters
All Plan Accounts	All plan accounts to which you have visibility, regardless of who owns the plan account.
Recently Modified Plan Accounts	All plan accounts with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Plan Accounts

The Recently Modified Plan Accounts section shows the plan accounts you modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Plan Account Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Objective Homepage:

- Recently Created Plan Accounts
- Recently Modified Plan Accounts
- My Recently Created Plan Accounts
- My Recently Modified Plan Accounts
- Additional report sections (Your company administrator can make report sections available for display on your Plan Account Homepage.)

To add sections to your Plan Account Homepage

1. On the Plan Account Homepage, click Edit Layout.
2. On the Plan Account Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Plan Accounts

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Plan Account pages, you must have the following privileges in your user role:

- Manage Business Planning Access
- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account
- Plan Contact
- Plan Opportunity

Related Information

See the following topics for related information about plan accounts:

- Plan Accounts (on page 384)
- Working with the Plan Account Homepage (on page 384)
- Plan Account Fields (on page 386)

Plan Account Fields

Use the Plan Account Edit page to add a plan account or update details for an existing plan account.

TIP: You can also edit plan accounts on the Plan Account List page and the Plan Account Detail page. For more information on updating records, see Updating Record Details.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the plan account fields.

Field	Description
Key Plan Account Information	
Account	The Oracle CRM On Demand account that is associated with this plan account record. Click the Lookup icon to select the associated account. (Required.) For more information on Account fields, see Account Fields (on page 284).
Primary Plan Account	Select this check box to indicate which account (if any) is the primary account associated with a plan.
Business Plan	The business plan that is associated with this plan account record. Click the Lookup icon to select the associated business plan. (Required.)
Account: Location	The location information from the Location field in the account record. It shows the type of facility operated by the account at this site, such as Headquarters. (View only.)

Field	Description
Account: Priority	The priority information from the Priority field in the account record. It shows the priority for the account, such as High, Medium, or Low. (View only.)
Account: Account Type	The account type information from the Account Type field in the account record. It shows the relationship of the account to your company, such as Prospect, Customer, Partner, or Competitor. (View only.)
Account: Reference	The reference information from the Reference check box in the account record. It indicates whether the account can be used as a reference for potential customers or sales representatives. (View only.)
Account: Owner	The owner information from the Owner field in the account record. It indicates the alias of the Account record owner. (View only.)

Related Information

See the following topics for related information about plan accounts:

- Plan Accounts (on page 384)
- Working with the Plan Account Homepage (on page 384)
- Managing Plan Accounts (on page 385)

Plan Contacts

Use the Plan Contact pages to create, update, and track contacts that are associated with business plans. A *plan contact* is a record that allows you to associate contacts with business plans, allowing each contact to have multiple business plans. For example, you can have one plan contact for a general sales force and one plan for a specialty sales force. At the same time, a plan contact allows a business plan to cover multiple contacts, for example, all the contacts in a territory.

Some users might not interact directly with the plan contact record type, but rather associate contacts with business plans from the Business Plan Detail page or from the Contact Detail page. Other users, however, might prefer to work directly with the plan contact record type.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Plan Contact information, the Plan Contact tab might be excluded from your setup.

Working with the Plan Contact Homepage

The Plan Contact Homepage is the starting point for managing plan contacts.

NOTE: Your company administrator can customize the layout of your Plan Contact Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Plan Contact

You can create a new plan contact by clicking the New button in the Recently Modified Plan Contacts section. For more information, see Creating Records (on page 51) and Plan Contact Fields (on page 389).

Working with Plan Contact Lists

The Plan Contacts Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for plan contacts.

Plan Contact List	Filters
All Plan Contacts	All plan contacts to which you have visibility, regardless of who owns the plan account.
Recently Modified Plan Contacts	All plan contacts with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Plan Contacts

The Recently Modified Plan Contacts section shows the plan contacts that have been modified most recently. To expand the list, click Show Full List.

Adding Sections to Your Plan Contact Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Plan Contact Homepage:

- Recently Created Plan Contacts
- Recently Modified Plan Contacts
- My Recently Created Plan Contacts
- My Recently Modified Plan Contacts
- Additional report sections (Your company administrator can make report sections available for display on your Plan Contact Homepage.)

To add sections to your Plan Contact Homepage

1. On the Plan Contact Homepage, click Edit Layout.
2. On the Plan Contact Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Plan Contacts

For step-by-step procedures for managing plan contacts that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Plan Contact pages, you must have the following privileges in your user role:

- Manage Business Planning Access
- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account
- Plan Contact
- Plan Opportunity

Related Information

See the following topics for related information about plan contacts:

- Plan Contacts (on page 387)
- Working with the Plan Contact Homepage (on page 387)
- Plan Contact Fields (on page 389)

Plan Contact Fields

Use the Plan Contact Edit page to add a plan contact or update details for an existing plan contact. The Plan Contact Edit page shows the complete set of fields for a plan contact.

TIP: You can also edit plan contacts on the Plan Contact List page and the Plan Contact Detail page. For more information on updating records, see Updating Record Details.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the plan contact fields.

Field	Description
Key Plan Contact Information	
Contact	The Oracle CRM On Demand contact that is associated with this plan contact record. Click the Lookup icon to select the associated contact. (Required.) For more information on contact fields, see Contact Fields (on page 305).
Primary Plan Contact	Select this check box to designate whether the contact is the main contact for the business plan.
Contact: First Name	The information from the First Name field in the contact record. (View-only.)
Contact: Last Name	The information from the Last Name field in the contact record. (View-only.)
Contact: Account	The account associated with the contact. (View-only.)

Field	Description
Business Plan	The business plan that is associated with this plan contact record. Click the Lookup icon to select the associated business plan. (Required.)

Related Topics

See the following topics for related information for plan contacts:

- Plan Contacts (on page 387)
- Working with the Plan Contact Homepage (on page 387)
- Managing Plan Contacts (on page 388)

Plan Opportunities

Use the Plan Opportunity pages to create, update, and track opportunities associated with a business plan. A *plan opportunity* associates opportunities with business plans, allowing an opportunity to be associated with multiple business plans (for example, one for a general sales force and one for a specialty sales force). A business plan can relate to multiple opportunities at the same time.

Some users might not interact directly with the plan opportunity record type, but rather associate opportunities with business plans from the Business Plan Detail page or from the Opportunity Detail page. However, other users might prefer to work directly with the plan opportunity record type.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Plan Opportunity information, the Plan Opportunity tab might be excluded from your setup.

Working with the Plan Opportunity Homepage

The Plan Opportunity Homepage is the starting point for managing plan opportunities.

NOTE: Your company administrator can customize the layout of your Plan Opportunity Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Plan Opportunity

You can create a plan opportunity by clicking the New button in the Recently Modified Plan Opportunities section. For more information, see Creating Records (on page 51) and Plan Opportunity Fields (on page 392).

Working with Plan Opportunity Lists

The Plan Opportunities Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for plan opportunities.

Plan Opportunity List	Filters
All Plan Opportunities	All plan opportunities to which you have visibility, regardless of who owns the plan opportunity.
Recently Modified Plan Opportunities	All plan opportunities with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Plan Opportunities

The Recently Modified Plan Opportunities section shows the plan opportunities that have been modified most recently. To expand the list, click Show Full List.

Adding Sections to Your Plan Opportunity Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Plan Opportunity Homepage:

- Recently Created Plan Opportunities
- Recently Modified Plan Opportunities
- My Recently Created Plan Opportunities
- My Recently Modified Plan Opportunities
- Additional report sections (Your company administrator can make report sections available for display on your Plan Opportunity Homepage.)

To add sections to your Plan Opportunity Homepage

1. On the Plan Opportunity Homepage, click Edit Layout.
2. On the Plan Opportunity Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Managing Plan Opportunities

For step-by-step procedures for managing plan opportunities that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

User Role and Access Profile Settings

To work with the Plan Opportunity pages, you must have the following privileges in your user role:

- Manage Business Planning Access
- Manage Period Administration

In addition, your access profile settings must allow you to access the following record types:

- Business Plan
- Objective
- Plan Account

- Plan Contact
- Plan Opportunity

Related Information

See the following topics for related, plan opportunity information:

- Plan Opportunities (on page 390)
- Working with the Plan Opportunity Homepage (on page 390)
- Plan Opportunity Fields (on page 392)

Plan Opportunity Fields

Use the Plan Opportunity Edit page to add a plan opportunity or update details for an existing plan opportunity.

TIP: You can also edit plan opportunities on the Plan Opportunity List page and the Plan Opportunity Detail page. For more information on updating records, see Updating Record Details.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the plan opportunity fields.

Field	Description
Plan Opportunity Information	
Business Plan	The business plan that is associated with this plan opportunity record. Click the Lookup icon to select the business plan. (Required.) For more information on business plans see Business Plans (on page 375).
Opportunity	The opportunity in Oracle CRM On Demand that is associated with this plan opportunity record. Click the Lookup icon to select the associated opportunity. (Required.) For more information on opportunities, see Opportunities (on page 309).
Opportunity: Account	The account associated with opportunity. (View-only.)
Opportunity: Close Date	The expected close date associated with the opportunity. (View-only.)
Opportunity: Forecast	If this check box is selected, it indicates that the opportunity is to be included in the forecast revenue calculation. (View-only.)
Opportunity: Owner	The information from the Owner field in the opportunity record. The owner is the person who is assigned to this opportunity. (View-only.)
Opportunity: Revenue	The potential revenue associated with the opportunity. (View-only.)

Related Topics

See the following topics for related information about plan opportunities:

- Plan Opportunities (on page 390)

- Working with the Plan Opportunity Homepage (on page 390)
- Managing Plan Opportunities (on page 391)

6 Service Requests and Solutions

Oracle CRM On Demand provides the following record types for information about customer services:

- **Service Requests.** Use these pages to manage service requests from customers for products or services.
- **Solutions.** Use these pages to store answers to common questions or service issues.

Process of Managing Service Requests

To manage service request, perform the following tasks:

1. Creating a Service Request (see Creating a Service Request on page 395).
2. Working on a Service Request (on page 395).
3. Resolving a Service Request (on page 395).
4. Closing a Service Request (on page 396).

Service requests can result from incoming calls from the customer.

Creating a Service Request

To create a service request, perform the following tasks:

1. Verify the customer information and record the service issue.
2. Use service scripts to consistently apply company procedures, such as identifying problems and escalating issues.

   For more information about scripts, see Using Service Request Scripts (on page 399).
3. Assign service requests to service representatives, see Assigning Service Requests (on page 399).

Working on a Service Request

To work on a service request, perform the following tasks:

1. Log the follow-up calls.
2. Log the tasks.
3. Log notes to record the actions taken to assist the customer.

For more information on adding activities to service requests, see Creating Activities (on page 199) and Activity Fields (on page 229).

Resolving a Service Request

To resolve a service request, perform the following tasks:

1. Search the solutions library for information to help you to resolve the customer request, see Reviewing Solutions (on page 408).

2 Link the appropriate solutions to the service request and rate their usefulness, so that the library can be continuously monitored and improve, see Rating Solutions (on page 408).
3 Use prebuilt or custom reports to identify the issues, see Running Analyses (on page 791).
4 Take immediate action to resolve them. If you cannot find a solution, add a new one to the library, see Managing Solutions (on page 407).

Closing a Service Request

To close a service request, perform the following tasks:

1 Record the wrap-up activities.
2 Close the service request when it is resolved, see Closing Resolved Service Requests (on page 401).

Service Requests

Use the Service Request pages to record, track, and address customer requests for information or assistance. A *service request* holds all the relevant, detailed information about a particular service activity. You can also use the service request to capture additional information, such as solutions or activities required to resolve the service request. Service representatives can access all the relevant information about service requests in one location. To ensure that a service request record captures all service activity, the changes to records are tracked through an audit trail. For information about dealing with service requests, see Process of Managing Service Requests (on page 395).

Working with the Service Request Homepage

The Service Request Homepage is the starting point for managing service requests.

NOTE: Your company administrator can customize the layout of your Service Request Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Service Request

You can create a service request record by clicking the New button in the My Open Service Requests section. For more information about service requests, see Assigning Service Requests (on page 399) and Service Request Fields (on page 401).

Working with Service Request Lists

The Service Request Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for service requests.

Service Request List	Filters
All Service Requests	none
All Closed Service Requests	Status = Closed
All Escalated Service Requests	Status = Open - Escalated
All Open Service Requests	Status=Open, Status = Open - Escalated

Service Request List	Filters
All Recently Created Service Requests	All service requests, sorted by the created date
All Recently Modified Service Requests	All service requests, sorted by the modified date
My Open Service Requests	Status = Open (displays records containing your user name in the Owner field)
My Service Requests	Service Requests with your name in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Open Service Requests

The My Open Service Requests section shows a list of your open service requests, in the order in which they were created. To expand the list, click the Show Full List link.

Viewing Service Request Related Tasks

The Service Request-Related Tasks section shows open service request-related tasks assigned to you, sorted by due date and then priority. It shows this information:

- **Due Date.** Date task is due as set by you or your manager.
- **Priority.** Priority for tasks as set by you or your manager, such as 1-High, 2-Medium, or 3-Low. The task priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

  NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values (on page 1254).

- **Subject.** Title of task. Click the link to review the task.
- **Service Request.** Number the system assigns to identify the service request.

Click Show Full List to expand the list of service request-related tasks.

Viewing Open Service Request Reports

The Open Service Request Analysis section shows service request reports by source, product area, user name, or priority. You can click a chart section or table item to see the details and to determine what needs to be done to resolve issues today. You can also change the categories in the drop-down list to view the same data from another perspective.

For example, you can:

- Use this analysis to keep informed about open and escalated service requests.
- Filter by Product Area to see which areas are generating the most calls.
- Filter by User Name to see how the workload is spread across the team.
- Filter by Priority to see the level of service issues being reported.

To access other types of service analyses, go to the Analytics tab.

Adding Sections to Your Service Request Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Service Request Homepage:

- Service Request-Related Tasks
- My Current Service Request Related Tasks (tasks that are due today)
- Additional report sections (your company administrator can make report sections available for display on your Service Requests Homepage)

To add sections to your Service Request Homepage

1. On the Service Request Homepage, click the Edit Layout link.
2. On the Service Request Homepage Layout page, use the directional arrows to add or remove sections and to organize the sections on the page.
3. Click Save.

Managing Service Requests

To manage service requests, do the following tasks:

- Assigning Service Requests (on page 399)
- Using Service Request Scripts (on page 399)
- Adding Solutions to Service Requests (on page 400)
- Escalating Service Requests (on page 400)
- Closing Resolved Service Requests (on page 401)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Viewing Audit Trails for Records (on page 175)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topic for related information:

- Working with Oracle Social Network (on page 418)

Assigning Service Requests

When you create a service request, the owner field is blank. You can either assign the owner manually or, if your company uses the assignment manager and the Service Request record type is configured for the user mode or mixed mode of record ownership, then the service request can be automatically assigned to an owner when the request is first saved. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

NOTE: The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. If there is a primary custom book assigned to the record before the assignment manager reassigns the record to an owner, then the assignment manager removes the primary book from the record. The assignment manager cannot reassign records if the record type is configured in book mode. If you configure a record type in book mode, then it is strongly recommended that you make all rule groups for that record type inactive.

If a service request has already been assigned and your access levels permit you to do so, then you can reassign the request by changing the owner name or the primary custom book on the request. In addition, if your company uses the assignment manager and the Service Request record type is configured for the user mode or mixed mode of record ownership, then you can reassign a service request to a new owner in one of the following ways:

- Select the Reassign Owner check box on the request.
- Delete the owner name or the primary custom book from the request.

Selecting the Reassign Owner check box or deleting the owner or primary custom book name triggers the assignment manager to process the service request again and assign it to an owner according to the rules set up by your company.

NOTE: If a service request has a status of Closed, then the assignment manager ignores the service request, and it is not reassigned. Also, the processing time for reassigning records can vary depending on the complexity of your company's assignment rules, the number of records to be reassigned, and current system load.

To manually assign a service request

1. Select the service request that you want to assign.

   For instructions on finding service requests, see Finding Records (on page 74).
2. On the Service Request Detail page, click Edit.
3. On the Service Request Edit page, position your cursor in the Owner field or Book field, click the Lookup icon, and then select a new owner or book in the Lookup window.
4. Save your changes.

Using Service Request Scripts

Your company administrator might have set up the assessment scripts to help you to gather information about the service requests (Call Scripts), or to assess the customer satisfaction levels (Customer Satisfaction Surveys). An assessment script consists of a series of questions that you use to collect customer data. Your responses are scored, assigned a weight, and compared with a specified threshold to determine the appropriate outcome or course of action.

Before you begin. To use assessment scripts, your user role must be set up to allow access to the assessment records. For more information about the required settings, see About Assessment Scripts (on page 1865).

To use a service request script

1. Select the service request.

   For more information on selecting service requests, see Finding Records (on page 74).

2 On the Service Request Detail page, scroll down to the Call Scripts section or the Customer Satisfaction Surveys section and click Add.

NOTE: If the Call Scripts section or the Customer Satisfaction Surveys section is not shown, click the Edit Layout link in the upper-right corner of the page, and add the appropriate section to your page layout. These sections are only available to add to your page if your company administrator has set them up.

3 In the Lookup window, search for the appropriate script, and click Select. You can use the filter fields at the top of the Lookup window to filter the list of scripts.

4 In the Call Scripts or Customer Satisfactions Survey window, select the answer for each script question, and then click Save.

The Service Request Detail page appears again. Depending on the outcome of the script, some of the fields on the record might have been automatically updated.

Adding Solutions to Service Requests

You can add an existing solution to your service requests. For more information on solutions, see Solutions (on page 404).

To add a solution to a service request

1. Select the service request.

   For more information on selecting service requests, see Finding Records (on page 74).
2. Scroll to the Solutions section of the Service Request Details page and click Add.

   A list of solutions that are approved and published appears.
3. To limit the number of solutions that appear, use the filtering options to search on keywords or Solution ID.
4. Click Preview to view the solution details to make sure that it addresses your customer's concerns.
5. Click the Select link beside each solution that you want to add to your service request, and then click OK.
6. Change the status of the service request to Pending until you can confirm with your customer that the problem is resolved, as follows:
   a. On the Service Request Details page, click in the Status field, and select the Pending status from the drop-down list.
   b. Click the green check mark icon in the Status field to save the change.

Escalating Service Requests

You can escalate a service request so that it stands out as an urgent matter.

To escalate a service request

1. On the Service Request List page, click in the Status field of the Service Request you want to escalate.
2. Select Open-Escalated from the drop-down list in the field.
3. Click the green check mark icon in the Status field to save the change.

Your company policy determines what actions are taken when a service request is escalated. For example, your company administrator might define a workflow rule that sends an email or generates a task when a service request is escalated.

You can create a filtered list to show all escalated service requests to which you have access.

Closing Resolved Service Requests

After you have satisfactorily answered your customer’s request, you can close the service request.

Before you begin: View the Service Request detail page to make sure that the service request is complete by verifying the following:

- All activities on the service request have a Completed status, indicating that you have followed up with your customer.
- If your company uses solutions, the solution is linked to the service request record, indicating how the problem was solved.

To close a resolved service request

1. On the Service Request List page, click in the Status field of the Service Request you want to close.
2. Select Closed from the drop-down list in the field.
3. Click the green check mark icon in the Status field to save the change.

Service Request Fields

Use the Service Request Edit page to add a service request or update details for an existing service request.

TIP: You can also edit service requests on the Service Request List page and the Service Request Detail page. For more information on updating records, see Updating Record Details (on page 115).

The Service Request Edit page shows the complete set of fields for a service request, as shown in the following table.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Contact Information	
SR Number	Service request ID. System-generated.
Account	Account linked to the service request.
Contact	Contact linked to the service request.
Work Phone #	Work phone number of the contact. Inherited from the Contact record.
Email	Email address of contact. Inherited from the Contact record.
Address	Address of contact or account for whom the service request is performed. You can select this address from a list of addresses associated with the account or the contact that is related to the service request record.
Service Detail Information	

Field	Description
Area	Category of service request, such as Product, Installation, Maintenance, Training, Other.
Cause	Reason for service request, such as Unclear Instructions, User Needs Training, Existing Issue, New Issue, Other
Type	Type of service request, such as Question, Issue, Enhancement Request, Other.
Source	Method by which service request is received, such as Phone, Web, Email, Fax.
Priority	Indication of priority, such as 1-ASAP, 2-High, 3-Medium, 4-Low.
Status	Status of service request, such as Open, Pending, Closed, Open-Escalated, Cancelled. Some filtered lists and reports use the Status field to determine which service requests to include. **NOTE:** Administrators can edit the Status picklist and add new values or update the existing values, if their role includes the Customize Application - Edit Service Request 'Status' Picklist and Customize Application privileges. For information on customizing picklist values, see Changing Picklist Values (on page 1254). **CAUTION:** When the Status field on a service request is set to either Closed or Cancelled, Oracle CRM On Demand automatically updates the Closed Time field on the service request to show the date and time that the status was changed. Consequently, it is strongly recommended that your company does not deactivate either of these values in the Status picklist for the Service Request record type. However, your company can change the display name for the Closed value, or the Cancelled value, or both values. If your company changes the display name for the Closed value, then Oracle CRM On Demand will update the Closed Time field on a service request when the status on the service request is changed to the value that was originally named Closed. Similarly, if your company changes the display name for the Cancelled value, then Oracle CRM On Demand will update the Closed Time field on a service request when the status on the service request is changed to the value that was originally named Cancelled.
Opened Time	Date and time you created the service request. System-generated.
Closed Time	Date and time status of service request changes to Closed or Cancelled. System-generated. **NOTE:** Your administrator can change the display names for the Closed and Cancelled status values.
Owner	The alias of the owner of the service request record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run in the Analytics pages.

Field	Description
	Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Reassign Owner	Indicates that the service request should be reassigned. If your company administrator has set up service request assignment rules, selecting this field triggers the assignment manager in Oracle CRM On Demand to process the service request again and assign it according to the rules. The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. The assignment manager cannot reassign records if the record type is configured in book mode. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47). **NOTE:** When you select this check box, the name in the Owner field changes when you save the record. However, depending on the complexity of your company's assignment rules, the number of records to be reassigned and the current system load, it may take some time for the tasks that are automatically performed to be completed, for example, sending the notification email.
Additional Information	
Subject	Summary of service request.
Description	Additional information about the service request. Limit of 16,350 characters.
Vehicle	The Vehicle ID Number (VIN) if a vehicle is associated with the service request.

Oracle Social Engagement and Monitoring Fields

If you are using Oracle Social Engagement and Monitoring, your administrator may add some or all of the following fields to the Service Request page. For more information, see About Oracle Social Engagement and Monitoring (on page 411).

Field	Description
Social Media	The ID for the social media record for an issue.
Social Media: Author Link	The URL to the profile of the author on the social media site.
Social Media:Community	The name, such as Facebook or Twitter, of the social media site where the message was posted.
Social Media:Influence Score	The influence score as sent by the partner.

Field	Description
Social Media:Post Data	The social media post data.
Social Media:Post Link	The URL to the social media post.
Social Media:Publish Date	The date the message was posted.
Social Media:Sentiment Score	The sentiment score as sent by the partner.
Social Media:Topic	The name of the post's topic as extracted from the post.

Solutions

Use the Solution pages to create, update, and track solutions. *Solutions* contain information about how to resolve a customer problem. By maintaining a knowledge base of solutions, your service representatives have access to a centralized knowledge base to help them resolve customer problems. In addition, the knowledge base expands as users interact with customers and create new solutions.

Oracle CRM On Demand tracks the usage of solutions and enables users to rate solutions. This information helps organizations to improve the solutions that they provide to customers and to identify problems in products or services. Frequently used solutions might indicate a product defect. Poor solution ratings might indicate the need to improve solutions.

About Managing Solutions

Consider implementing a process similar to the following to build and manage a knowledge base of solutions:

1. A company administrator imports your existing solutions into the application (optional).
2. Service agents and other experts add draft solutions to expand the breadth and depth of your knowledge base over time.
3. Service managers review, approve, and publish solutions.
4. Agents score existing solutions to make sure the most helpful solutions rise to the top.
5. Service managers monitor the solutions knowledge base to ensure that only valid and current information is represented.

Best Practice Tips for Managing Your Solutions Knowledge Base

Having a well-organized and peer-evaluated library of solutions helps you consistently serve your customers more effectively. Here are some best practice tips for setting up and managing your solutions knowledge base.

1 – Import Your Existing Solutions

Before you import solutions, compare the information in your existing solutions with the Solution record in Oracle CRM On Demand. You might want to add, rename, or remove fields from the record to match the information that you want to import.

You can use the Custom Field Setup Template, available in the Tools and Templates page in the Training & Support Center, to help you plan changes. This document will help you plan for and keep track of any custom changes that you want to make to the application.

2 – Add Draft Solutions

Establish guidelines for creating solution records and communicate these to anyone who might create draft solutions, such as service agents, product or, service experts. Be sure to emphasize the importance of the Title field in a solution record. This is a searchable field which appears on most lists and Lookup windows for solutions. Therefore, service agents will use it to quickly identify appropriate solutions to their questions or problems.

When a new solution record is created, it has a status of Draft. Draft solutions are not available to be added to service request records and will not appear in the solution Lookup window until they are published. So, if an agent creates a Service Request and enters a draft solution during the call, the agent can add the draft solution to the Service Request, but the draft solution will not be accessible to other agents until it is published.

3 – Review, Approve, and Publish Solutions

The approval process ensures that your identified experts get a chance to review all solutions before releasing them for general use by your service agents. Establish review and approval guidelines to ensure that all solutions are valid, easy to follow, and consistently useful to those who need them.

You must have a role with the Publish Solutions privilege to change a solution status to Approved and to publish the solution. For more information, see Approving and Publishing Solutions (on page 408).

4 – Rate Solutions

Ask your service agents to rate the solutions that they use and add to their service request records. They can easily do this from the Solution Detail page by clicking the Rate Solution button. Solutions are rated on a 1 – 5 scale. If the solution was highly effective, rate it a 5. If it was not effective or valid, rate it a 1.

Every time a solution is rated, its rating score is recalculated and displayed on the record. Having your agents rate the solutions gives you information you can use to monitor the quality of your knowledge base. For more information, see Rating Solutions (on page 408).

5 – Monitor Solutions

Make sure that you regularly monitor your solutions knowledge base so that your service agents have the best and most current information and instructions. Some recommendations are:

- Assign an owner for certain areas or types of solutions and have each owner regularly review and update those solutions. Make each owner responsible for the accuracy and approval of his or her area.
- Over time, your solutions can become obsolete. Solutions related to products that are no longer supported are just one example. Create a Solution list to locate these solutions, filtering by the Product field, for example. Then, use the Mass Update feature to remove them from the searchable solutions.
- Do not delete a solution, unless it is a duplicate. Instead, set the status to Obsolete. Obsolete solutions no longer appear on the list when searching for a solution to add to a service request. However, you can still use the lists on the Solutions Homepage to access them if you need them.
- Review all solutions that are rated low. To find them, create a custom list that shows you all published solutions rated a 1 or 2.
- Use the prebuilt Solution lists on the Solutions Homepage to review your top-rated solutions and most active solutions. By doing so, you have an indication of any areas where you can potentially add more knowledge and expand your library.
- Routinely analyze your closed service requests for trends, and identify key problem areas where additional information should be added to your knowledge base.

Working with the Solution Homepage

The Solution Homepage is the starting point for managing solutions.

NOTE: Your company administrator can customize the layout of your Solution Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Solution Record

You can create a solution record by clicking the New button in the My Recently Viewed Solutions section. For more information, see Creating Records (on page 51) and Solution Fields (on page 409).

Working with the Solution Lists

The Solution Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for Solutions.

Solution List	Filters
Approved Solutions	Status = Approved
Published Solutions	Published = Y
Recently Created Solutions	All solutions, sorted by the created date
Recently Modified Solutions	All solutions, sorted by the modified date
Draft Solutions (visible only to users with the Publish Solutions privilege)	Status = Draft
Highest Rated Solutions	Highest cumulative ratings given by all individuals
Most Active Solutions	Frequently linked with Service Requests
All Solutions	All solutions, sorted alphabetically on Solution Title
My Recently Modified Solutions	All solutions you own, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Viewed Solutions

The My Recently Viewed Solutions section shows the solutions that you viewed most recently.

Viewing Most Active Solutions

The Most Active Solutions section shows the solutions that have been frequently linked with service requests. High usage can indicate to a service organization the specific areas where customers are being challenged by product and services. Organizations can respond by providing more information to service representatives to help customers or by providing more information to customers directly.

Viewing Highest Rated Solutions

The Highest Rated Solutions section lists the solutions with the highest cumulative ratings given by all individuals.

Adding Sections to Your Solution Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Solution Homepage:

- Recently Created Solutions
- Recently Modified Solutions
- My Recently Created Solutions
- My Recently Modified Solutions
- One or more report sections (Your company administrator can make reports available on your Solution Homepage.)

The following procedure describes how to add sections to your Solution Homepage.

To add sections to your Solution Homepage

1. On the Solution Homepage, click Edit Layout.
2. On the Solution Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Solutions

To manage solutions, perform the following processes:

- Reviewing Solutions (on page 408)
- Approving and Publishing Solutions (on page 408)
- Rating Solutions (on page 408)
- Adding Books to a Solution (on page 409)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Attaching Files and URLs to Records (on page 163)
- Viewing Audit Trails for Records (on page 175)

NOTE: To change the status of a solution record, or to publish a solution, your user role must include the Publish Solutions privilege.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Solution Fields (on page 409)
- Analytics (on page 789)
- Importing Your Data (on page 1827)

Reviewing Solutions

You can review the most active solutions or the highest rated solutions. You can also review the complete information for any solution record.

To review the most active solutions

1. From any page, click the Solutions tab.
2. In the Most Active Solutions section, click the Solution Title link for the solution you want to review.

To review the highest rated solutions

1. From any page, click the Solutions tab.
2. In the Highest Rated Solutions section, click the Solution Title link for the solution you want to review.

To review solution information

1. Select the solution.

   For instructions on selecting solutions, see Finding Records (on page 74).
2. On the Solution Detail page, you can review the solution record.

   For a description of fields, see Solution Fields (on page 409).

Approving and Publishing Solutions

Before you begin. To perform this procedure, your user role must include the Publish Solutions privilege.

You can review solutions for accuracy and completeness. Then you can approve the draft and publish it internally. Publishing a solution internally makes it available for all customer service representatives to use and link to service requests.

To approve and publish a solution

1. From the Solutions Homepage, click the Draft Solutions link.
2. From the Solutions List page, select the solution and then click Edit.
3. On the Solution Edit page, change the Status to Approved to approve the solution.
4. To publish the solution, select the Published check box.
5. Save the record.

Rating Solutions

You can rate the effectiveness of a solution as many times as you want to.

To rate solution information

1. Select the solution.

   For instructions on selecting solution, see Finding Records (on page 74).
2. In the Solution Details title bar, click the Rate Solution button.
3. On the Solution Rating page, select a rating from 1 to 5 (5 is the best) from the drop-down list.
4. Save the record.

   Individual user ratings are averaged to determine which solutions appear in the Highest Rated Solutions section on the Solutions Homepage.

Adding Books to a Solution

Use the following procedure to add books to a solution. When you add a book to a solution, you can modify or remove the book. This procedure assumes that the Books record type is displayed as a related item on the Solution page. For more information about customizing related item information, see Customizing Related Item Layouts (on page 1258).

To add a book to a solution

1. On the Solution List page, open the solution that you want.
2. On the Solution Detail page, click Add in the Books section of the page.
3. In the Book selector, choose the book that you want to add to the solution, and then click OK.

For more information about books, see Book Management (on page 1421).

Solution Fields

Use the Solution Edit page to add a solution or update details for an existing solution. The Solution Edit page shows the complete set of fields for a solution.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in drop-down lists. Therefore, the information you see onscreen might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Solution Detail Information	
Solution ID	Unique ID of the solution. System-generated.
Title	Solution title. This field has a limit of 100 characters and is required.
Status	Solution’s status, such as Draft, Approved, or Obsolete. Defaults to Draft. Only users with the Publish Solutions privilege can change this information.
Published	Indication that the solution is available for internal use. Only users with the Publish Solutions privilege can change this information.
Solution Rating	Rating of the solution from 1 to 5 (5 is the best).
Additional Information	
NOTE: The following fields are available with Oracle CRM On Demand Life Sciences Edition and might not be available for your configuration. If these fields are not available, contact your company administrator.	
Legal Approval	Indicates that the solution has received legal approval.
Marketing Approval	Indicates that the solution has received marketing approval.

Field	Description
Multi-file asset	Indicates that the solution consists of multiple digital files. A given solution image might consist of separate files for photos, logos, and other components of a larger image.
Expiration Date	The date after which this content must not be used in Personalized Content Delivery (PCD). Use the calendar icon to select the expiration date.
Release Date	The date after which this content can be used in PCD. Use the calendar icon to select the release date.
Verification Status	Indicates whether the solution can be displayed correctly. When users load multimedia or graphic files, they test them to make sure that they are displayed correctly, and they set the verification status to Successful. The values are: Not Verified, Successful, or Failed.
PCD Attachment Type	Indicates the type of the attached multimedia or graphic file: - **Message.** The content is suitable for a presentation. - **Thumbnail.** The content is a smaller, compressed version of a larger message record.
Related Thumbnail Image	The name of another solution record that provides a small thumbnail version of the main message solution. Each solution of the type Message must have a matching solution of the type Thumbnail.
Distribution Method	Select Publish to distribute the content automatically to remote users. The distribution is based on users' permissions.
NOTE: The following fields are available by default for all editions of Oracle CRM On Demand.	
FAQ	Frequently asked questions about the solution.
Solution Details	Additional information about the solution.

7 Social Networking

Oracle CRM On Demand allows you to work with social networking tools such as Oracle Social Engagement and Monitoring so that you can engage with your customers through social media.

About Oracle Social Engagement and Monitoring

Oracle Social Engagement and Monitoring is a separate application that monitors social media sites for comments about your company, to help you to respond appropriately to such comments. When an Oracle Social Engagement and Monitoring user detects a comment that contains an issue or complaint that needs to be addressed through a service request in Oracle CRM On Demand, the user can send details of the comment directly from Oracle Social Engagement and Monitoring to Oracle CRM On Demand, by clicking Send to CRMOD. When Oracle CRM On Demand receives the information, the following happens:

- Oracle CRM On Demand creates a social media record for the issue that includes a URL to the post, the name of the post's author, and the name of the social community where the post is located.
- Oracle CRM On Demand creates a social profile record (if one does not already exist) for the author of the post. If possible, Oracle CRM On Demand associates the social profile to an existing contact in Oracle CRM On Demand.
- Oracle CRM On Demand creates a service request record and an activity record to resolve the issue.

A customer service representative can then follow up on the service request and resolve the issue.

To enable the service request features, your company administrator must add the Oracle Social Engagement and Monitoring fields to the service request page layout for your role. For more information on the specific social media fields, see Service Request Fields (on page 401). For more information on how to add fields to a page, see Customizing Static Page Layouts (on page 1267).

Related Topics

See the following topics for related information about social media and social profiles:

- Social Media (on page 411)
- Social Profiles (on page 414)

Social Media

Use the Social Media pages to record information about the social media postings of your contacts.

Related Topics

See the following topics for related information about social media:

- Working with the Social Media Homepage (on page 412)
- Managing Social Media (on page 413)
- Social Media Fields (on page 413)
- About Oracle Social Engagement and Monitoring (on page 411)

Working with the Social Media Homepage

The Social Media Homepage is the starting point for managing social media records.

NOTE: Your company administrator can customize the layout of your Social Media Homepage. In addition, if your user role includes the Personalize Homepages privilege, then you can add sections to the page, and remove sections from the page.

Creating a Social Media Record

To create a social media record, click the New button in the Recently Modified Social Media section of the Social Media Homepage.

Working with Social Media Lists

The Social Media Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that enable you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for social media.

Social Media List	Filters
All Social Media	All social media records to which you have visibility.
Recently Modified Social Media	All social media records to which you have visibility, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Social Media Records

The Recently Modified Social Media section shows the social media records that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Social Media Homepage

If your user role includes the Personalize Homepages privilege, then you might be able to add additional sections to your Social Media Homepage. Your company administrator can make sections available for display on your Social Media Homepage.

To add sections to your Social Media Homepage

1 On the Social Media Homepage, click Edit Layout.
2 On the Social Media Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about social media records:

- Social Media (on page 411)
- Social Media Fields (on page 413)
- About Oracle Social Engagement and Monitoring (on page 411)

Managing Social Media

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about social media records:

- Social Media (on page 411)
- Working with the Social Media Homepage (on page 412)
- Social Media Fields (on page 413)

Social Media Fields

The Social Media Edit page shows the complete set of fields for a social media record.

TIP: You can also edit social media records on the Social Media List page and the Social Media Detail page. For more information about updating records, see Updating Record Details.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the social media fields.

Field	Description
Author	The unique user name of the contact on a specific social media site, for example, Facebook or Twitter, who posted a message.
Community	The name of the social media site, such as Facebook or Twitter, associated with this contact. This text field has a maximum of 255 characters.
Network Message Id	An identifier to uniquely identify the message in the social media site. This text field has a maximum of 255 characters.

Field	Description
Post Link	A unique URL to the post on the social media site.
Unique ID	An identifier to uniquely identify the social media record. This text field has a maximum of 255 characters.
Created	The creator of the social media record, and the date and time that it was created.
Modified	The last person to modify the social media record, and the date and time that it was modified.

Related Topics

See the following topics for related information about social media records:

- Social Media (on page 411)
- Working with the Social Media Homepage (on page 412)
- About Oracle Social Engagement and Monitoring (on page 411)

Social Profiles

Use the Social Profile pages to record information about the profiles of contacts who engage in social media interactions. Oracle CRM On Demand creates a social profile for a contact when Oracle Social Engagement and Monitoring detects a social media post that needs to be addressed. For more information, see About Oracle Social Engagement and Monitoring (on page 411).

Related Topics

See the following topics for related information about social profiles:

- Working with the Social Profile Homepage (on page 414)
- Managing Social Profiles (on page 415)
- Social Profile Fields (on page 416)
- About Oracle Social Engagement and Monitoring (on page 411)

Working with the Social Profile Homepage

The Social Profile Homepage is the starting point for managing social profiles.

NOTE: Your company administrator can customize the layout of your Social Profile Homepage. In addition, if your user role includes the Personalize Homepages privilege, then you can add sections to the page, and remove sections from the page.

Creating a Social Profile Record

To create a social profile record, click the New button in the Recently Modified Social Profiles section of the Social Profile Homepage.

Working with Social Profile Lists

The Social Profile Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that enable you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for social profiles.

Social Profile List	Filters
All Social Profiles	All social profiles to which you have visibility.
Recently Modified Social Profiles	All social profiles to which you have visibility, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Social Profiles

The Recently Modified Social Profiles section shows the social profiles that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Social Profile Homepage

If your user role includes the Personalize Homepages privilege, then you might be able to add additional report sections to your Social Profile Homepage. Your company administrator can make report sections available for display on your Social Profile Homepage.

To add sections to your Social Profile Homepage

1 On the Social Profile Homepage, click Edit Layout.
2 On the Social Profile Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about social profiles:

- Social Profiles (on page 414)
- Social Profile Fields (on page 416)
- About Oracle Social Engagement and Monitoring (on page 411)

Managing Social Profiles

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about social profiles:

- Social Profiles (on page 414)
- Working with the Social Profile Homepage (on page 414)
- Social Profile Fields (on page 416)
- About Oracle Social Engagement and Monitoring (on page 411)

Social Profile Fields

The Social Profile Edit page shows the complete set of fields for a social profile.

TIP: You can also edit social profiles on the Social Profile List page and the Social Profile Detail page. For more information about updating records, see Updating Record Details.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the social profile fields.

Field	Description
Author	The unique user name of the contact on a specific social media site, for example, Facebook or Twitter, who posted a message.
Community	The social media site, such as Facebook or Twitter, where the contact was observed. This text field has a maximum of 255 characters.
Network Author Id	An identifier to uniquely identify the author in the social media site. This text field has a maximum of 100 characters.
Active	Indicates whether this social profile is active.
Contact	An existing contact within Oracle CRM On Demand.
Created	The person who created the social profile record, and the date and time that it was created.
Modified	The last person to modify the social profile record, and the date and time that it was modified.

Related Topics

See the following topics for related information about social profiles:

- Social Profiles (on page 414)
- Working with the Social Profile Homepage (on page 414)
- About Oracle Social Engagement and Monitoring (on page 411)

About Oracle Social Network

Oracle Social Network is a secure, private network that provides a range of social tools for capturing and sharing business information. If your company uses Oracle Social Network, then your administrator can integrate Oracle Social Network with Oracle CRM On Demand. After Oracle Social Network is integrated with Oracle CRM On Demand, you can share information from records of certain Oracle CRM On Demand record types as social objects in Oracle Social Network. For more information about social objects, see the help documentation for Oracle Social Network.

Depending on how your administrator configures the integration with Oracle Social Network, you might be able to share records of the following record types:

- Account
- Opportunity
- Service Request

Your administrator determines which fields from the records are displayed in the social object in Oracle Social Network. A maximum of 10 fields from a record can be displayed in a social object. If the Social related information section is available on your Detail page layout for a record type, then you can do the following for any record of that type from the Detail page of the record in Oracle CRM On Demand, provided that you have the necessary access rights to the record:

- Share the record in Oracle Social Network, if the record has not already been shared. In Oracle Social Network, you can then add other users in Oracle Social Network as members of the social object. After you share a record in Oracle Social Network, you can see the wall for the social object in Oracle Social Network in the Social section of the record Detail page in Oracle CRM On Demand.
- Join the social object, if another user already shared the record in Oracle Social Network. After you join the social object in Oracle Social Network, you can see the wall for the social object in Oracle Social Network in the Social section of the record Detail page in Oracle CRM On Demand.
- Post updates to the social object in Oracle Social Network, if you are a member of the social object in Oracle Social Network. When you update the fields on a record in Oracle CRM On Demand that are displayed in the social object in Oracle Social Network, you can post your updates to the social object in Oracle Social Network, so that the information in Oracle Social Network is kept up to date.
- Access conversations about the social object in Oracle Social Network, if you are a member of the social object. When you click a link or button in the Oracle Social Network Web applet in the Social section, Oracle Social Network opens in a separate browser window, and you can use all of the functionality that is available to you in Oracle Social Network.

For example, if you are a member of the team for an opportunity in Oracle CRM On Demand, you can do the following:

- In Oracle CRM On Demand, share the opportunity as a social object in Oracle Social Network.
- In Oracle Social Network, add the other members of the opportunity team to the new social object. You can also add other Oracle Social Network users to the social object, even if the Oracle Social Network users are not users in Oracle CRM On Demand.

You and the other members of the social object can then start and participate in conversations about the social object for the opportunity in Oracle Social Network.

Related Topics

See the following topic for related information:

- Working with Oracle Social Network (on page 418)

Working with Oracle Social Network

This topic describes how to:

- Share a record from Oracle CRM On Demand in Oracle Social Network.
- Join a social object in Oracle Social Network from a record detail page in Oracle CRM On Demand.
- Post updates to the fields in a social object in Oracle Social Network.
- Access all of the conversations that you are part of in Oracle Social Network.

Before you begin. To perform the tasks described in this topic, you must have the Oracle Social Network Integration privilege in your user role in Oracle CRM On Demand. To allow you to share and update records in Oracle Social Network, your administrator must make the Social related information section available in the Detail page layout for the record type for your user role. To allow you to access all conversations that you are part of in Oracle Social Network, your company administrator must make the Social Web tab available for your user role.

NOTE: A record can be shared in Oracle Social Network only once. After a user shares a record in Oracle Social Network, the Share button is no longer available in the Social section of the Detail page for the record in Oracle CRM On Demand. Instead, you see either the Join button or the Update button. If you are not yet a member of the social object in Oracle Social Network, then you see the Join button. If you are already a member of the social object in Oracle Social Network, then you see the Update button.

To share a record in Oracle Social Network

1. In Oracle CRM On Demand, find the record that you want to share.
   For instructions on finding records, see Finding Records (on page 74).
2. Open the record in the Detail page and scroll to the Social section of the page.
3. In the title bar of the Social section of the page, click Share.

To join the social object for a record that has been shared in Oracle Social Network

1. In Oracle CRM On Demand, in the record Detail page, scroll to the Social section of the page.
2. In the title bar of the Social section of the page, click Join.

To post updates to the fields in a social object in Oracle Social Network

1. In Oracle CRM On Demand, in the record Detail page, scroll to the Social section of the page.
2. In the title bar of the Social section of the page, click Update.

To access all of the conversations that you are part of in Oracle Social Network

- Click the Social tab.

Related Topics

See the following topic for related information:

- About Oracle Social Network (on page 417)

8 Partner Relationship Management and High Tech

Oracle CRM On Demand provides the following record types for Partner Relationship Management (PRM):

- **Partners.** Use these pages to manage information about the external companies or contacts at companies who sell or service products belonging to your company.
- **Partner Programs.** Use these pages to track the requirements and benefits for companies that are part of your company's partner programs.
- **Applications**. Use these pages to manage the applications from new or existing partners for partnership with the brand owner company.
- **Deal Registrations**. Use these pages to manage the deal registrations that allow partners to request exclusive rights to an opportunity from the brand owner company.
- **MDF Requests**. Use these pages to manage the market development funds (MDF) requests for monetary funds given by a manufacturer's sales or marketing department. MDF requests help a partner to sell its products or to market the manufacturer's brand.
- **SP Requests**. Use these pages to manage the special pricing (SP) requests from partners for a price adjustment to a product.
- **Funds.** Use these pages to manage fund requests, credits, and approvals.
- **Training and Certification (T&C)**. Use these pages to create awareness among the partner community about the training courses and programs offered for the products and services of the brand owner company. T&C also helps to track the skills and competencies of the partner companies and their employees. The T&C record types are:
  - Courses
  - Exams
  - Certifications
  - Accreditations

Note: All of these record types are available only with Oracle CRM On Demand Partner Relationship Management Edition. The Funds record type is also available with Oracle CRM On Demand High Tech Edition.

Managing PRM and High Tech

For more information on managing and configuring Partner Relationship Management (PRM), see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*.

Partners

Use the Partner pages to track partner companies and their members, create partner accounts in Oracle CRM On Demand to support partner users, and set the appropriate levels of access to Oracle CRM On Demand and data visibility for each partner account.

About Partners

The Partner tab represents any external company that sells or services products belonging to the brand owner.

The Partners pages in Oracle CRM On Demand allow you to define the business information about the partner as well as the partnership information between the brand owner and the partner. Examples of partner profile information are company name, address, phone numbers, fax number, Web site, annual revenue, number of employees, market, industry, description of business, and so on.

About Partner Accounts

A *PRM partner account*, also known as a managed partner account, is a partner with users in Oracle CRM On Demand. A nonmanaged partner account has no users in Oracle CRM On Demand. A PRM partner account is present in both the Account tab and the Partner tab and has the following attributes:

- It is an account with the account type set to Partner.
- The managed partner flag value is set to Y.
- The partner organization status is set to Active.

For organizations that are both accounts to whom sales representatives sell and PRM Partners, you must create two records: an account record and a partner record.

The partner record type is a subclass of the account record type, therefore, custom fields that are added to the account record type are also available for the partner record type. However, the reverse is not true: custom fields added to the partner record type are not available for the account record type.

In general, keep partner-specific attributes in the Partners tab, and keep account-specific attributes that are not related to the partnership in the Accounts tab. However, sometimes you might want to have a partner-specific attribute available on the Accounts tab. In this case, you can add custom attributes to the account record type. These attributes become part of the Partner record type automatically.

When you view the partner account from the Accounts tab, you can see the Account Type field, and it is set to Partner. When you view a partner account from the Partners tab, the Account Type field is not displayed, because the only value that a partner account can have is Partner.

NOTE: While the partner organization status is set to Active, the account type of a partner account must be set to Partner.

Working with the Partners Homepage

The Partners Homepage is the starting point for managing partners.

NOTE: Your company administrator can customize the layout of your Partners Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Partner Account

You can create a partner account by clicking the New button in the Recently Modified Partners section. For more information on creating partners, see Creating Records (on page 51) and Partner Fields (on page 423).

TIP: You can indicate partner hierarchies, such as a company that is a subsidiary of another company by selecting parent accounts. For more information about partner hierarchies, see Specifying Parent Accounts (on page 272).

Working with Partner Lists

The Partner Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for partners.

Partner List	Description
All Partners	Filters all partners to which you have visibility, regardless of owner.
My Partners	Partners with your name in the Owner field.
Recently Created Partners	All partners, sorted by the created date.
Recently Modified Partners	All partners, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Partners

The Recently Modified Partners section shows the partners that you modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Partners Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Partners Homepage:

- All Active Partners
- All Inactive Partners
- Recently Created Partners
- Recently Modified Partners
- One or more report sections (your company administrator can make report sections available on your Partners Homepage)

To add sections to your Partners Homepage

1. On the Partners Homepage, click Edit Layout.
2. On the Partners Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
3. Click Save.

Managing Partner Accounts

To manage partner accounts, do the following tasks:

- Activating and Inactivating Partner Accounts (on page 422)
- Searching For Partner Accounts (on page 423)
- Deleting Partner Accounts (on page 423)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)

- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Tracking Partners and Competitors of Accounts (on page 276)
- Tracking Relationships Between Accounts (on page 273)
- Adding Notes (on page 157)
- Attaching Files and URLs to Records (on page 163)
- Viewing Audit Trails for Records (on page 175)

NOTE: When you create a partner account and set the Partner Organization Status field on the account to Active, a book is automatically created for the partner account. The automatically generated name of the book includes the name of the partner account. When a user is added to the partner organization, that is, when the partner account is selected in the Partner Organization field on the user's record, the user is also associated with the book that was automatically created for the partner account. If the user's partner organization is later changed to a different partner organization, then the user is automatically removed from the partner book for the old partner organization and added to the correct partner book for the new partner organization.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Activating and Inactivating Partner Accounts

If a partnership has been suspended or terminated, you can deactivate that partner account. By deactivating the partner account, you can allow it to remain in Oracle CRM On Demand to be activated again later.

To activate or deactivate a partner account

1. Navigate to the Partner Edit page.
2. In the Partner Organization Status list, select Active to activate the partner account, or select Inactive to deactivate the partner account.
3. Click Save.

   NOTE: Deactivating a partner account does not allow you to change the Account Type value from the Accounts tab, or delete the account from the Accounts tab. If an account is active, you can neither delete it nor change its Account Type value from the Accounts tab.

Converting Accounts to Partner Accounts

In Oracle CRM On Demand you can convert accounts to partner accounts if your access levels permit you to do so.

Before you begin. Your company administrator must have added the Managed Partner check box to the detail page.

To convert an account to a partner account

1. On the Account List, select the account that you want to convert to a partner account.
2. On the Account Detail page, click Edit.
3. On the Edit Account page, change the account type to Partner.
4. Select the Managed Partner check box, and then click Save.

NOTE: If the Partner record type is configured in the user mode of record ownership, then when you complete this task, the name of the Owner field automatically changes to the name of the user performing the conversion, and the new partner is added to the owner's partner team.

To ensure that a partner account cannot revert to a regular account

1. Navigate to the Partner List on the Partner Tab, and select the partner account.
2. On the Partner Detail page, click Edit.
3. On the Edit Partner page, change the status of the partner organization to Active.

   After you set the status to Active, the partner account cannot be changed to a regular account.

Searching for Partner Accounts

You can search for partner accounts by using the Advanced Search functionality in the action bar. You must specify the following search criteria:

- Field is set to Account Type
- Condition is set to Equal to
- Filter Value is set to Partner

To search for PRM partner accounts (managed partner accounts), you must specify the search criteria in the preceding list, and you must set the following search criteria:

- The field is set to Managed Partner Flag.
- The condition is set to Equal to.
- The filter value is set to Y.

For more information on searching for records, see: Finding Records (on page 74).

Deleting Partner Accounts

Because partner accounts can also be used as accounts, partner accounts might be associated with opportunities as well as with other records. Deleting a partner account might generate errors because of these associations.

Because accounts can also be used as partner accounts, deleting an account with an account type of Partner from the Accounts tab might also generate errors. As a result, you cannot delete partner accounts from the Partners tab. You can only deactivate partner accounts. If the account has no other use, and you want to delete it, it is possible to delete the inactive partner account from the Accounts tab.

When deleting an account that is of type partner from the Accounts tab, Oracle CRM On Demand checks to ensure the partner organization status is Inactive, which prevents accidental deletion of an active partner record. For information about deleting and restoring records, see Deleting and Restoring Records (on page 173).

Partner Fields

Use the Partner Edit page to add a partner or update details for an existing partner. The Partner Edit page shows the complete set of fields for a partner.

TIP: You can also edit partners on the Partner List page and the Partner Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Partner Information	
Partner Name	The name of the partner. To avoid duplicate records, make sure that you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on.
Primary Partner Type	Select the partner type you want to use as the primary one for this partner account.
Location	The type of facility operated by the partner at this site, such as Headquarters.
Partner Organization Status	Indicates whether the partner account is active or inactive.
Parent Account	The name of the company that the partner is a subsidiary of.
Main Phone #	The primary phone number used to reach the partner.
Main Fax #	The primary fax number for the partner.
Web Site	URL address for the partner.
Price List	The price list to which the partner account is associated. Typically this price list is the one that stores the partner's purchase cost.
Additional Information	
Billing and Shipping Addresses	Selecting a country determines the labels for the remaining address fields, according to that country's address convention. The screen might refresh to display the field names. **NOTE:** If shared addresses are set up for your company, the billing and shipping addresses are read-only, and the address fields change to meet the requirements for shared addresses. For more information on shared addresses, see Addresses.
Owner	The alias of the owner of the partner record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. To reassign ownership of a partner record, you must have the Read/Edit access level setting for the record. The value in the Owner field affects which records are included in the reports that you or your managers run. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Field	Description
Channel Account Manager	The channel account manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel account managers serve as the primary contact for the partner.
Number of Active Users	This is a calculated field that determines the current number of active users in Oracle CRM On Demand for the partner.
Maximum Number of Users	The maximum number of users that a partner organization can have. A partner cannot have more users than the number defined in this field.
Remaining Number of Users Available	This is a calculated field that equals the difference between the Maximum Number of Users field and the Current Number of Active Users field. When the value of this field is 0 (zero), then you cannot add any more active users to Oracle CRM On Demand.
Description	Additional information about the partner. This field has a limit of 2,000 characters.

Partner Programs

Use the Partner Program pages to do the following:

- Manage different types and levels of partner programs.
- Specify different types of partners.
- Administer the partner program memberships.

A *partner program* describes the requirements and benefits for the partner when the partner is a member of the partner program. Partner programs are designed to recruit partners by the company that owns the brand.

Working with the Partner Programs Homepage

The Partner Programs Homepage is the starting point for managing partner programs.

NOTE: Your company administrator can customize the layout of your Partner Programs Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Partner Program

You can create a partner program by clicking the New button in the Recently Modified Partner Programs section. For more information, see Creating Partner Programs (on page 427) and Partner Program Fields (on page 430).

Working with Partner Program Lists

The Partner Program Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for partner programs.

Partner Program List	Description
Recently Created Partner Programs	Filters all partner programs, sorted by the created date.
Recently Modified Partner Programs	Filters all partner programs, sorted by the modified date.

Partner Program List	Description
All Partner Programs	This list is not filtered. It displays all partner programs to which you have visibility, regardless of who owns the partner program.
My Partner Programs	Filters partner programs with your name in the Owner field.
My Recently Created Partner Programs	Filters partner programs with your name in the Owner field, sorted by the created date.
My Recently Modified Partner Programs	Filters partner programs with your name in the Owner field, sorted by the modified date.
All Inactive Partner Programs	Filters all partner programs with a status of Inactive.
All Active Partner Programs	Filters all partner programs with a status of Active.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Partner Programs

The Recently Modified Partner Programs section shows the partner programs that you modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Partner Programs Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Partner Programs Homepage:

- All Active Partner Programs
- All Inactive Partner Programs
- Recently Created Partner Programs
- Recently Modified Partner Programs
- My Recently Created Partner Programs
- My Recently Modified Partner Programs
- One or more report sections (your company administrator can make report sections available on your Partner Programs Homepage)

To add sections to your Partner Programs Homepage

1. On the Partner Programs Homepage, click Edit Layout.
2. On the Partner Programs Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
3. Click Save.

Managing Partner Programs

To manage partner programs, do the following tasks:

- Creating Partner Programs (on page 427)
- Managing Partner Program Memberships (on page 427)
- Deleting Partner Programs (on page 429)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Working with Attachments (on page 161)
- Viewing Audit Trails for Records (on page 175)
- Tracking Partners and Competitors of Accounts (on page 276)
- Tracking Relationships Between Accounts (on page 273)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Creating Partner Programs

From Oracle CRM On Demand, you create a partner program by entering information in a form. You can access this form from different areas within Oracle CRM On Demand, depending on what you are working on and what tasks you want to do.

To create a partner program

1. From the Partner Program List page, click New Partner Program.

   The Partner Program Edit page appears.
2. In the Partner Program Name field, type a name for the partner program you are creating.

   TIP: Each partner program name must be unique.
3. In the Status field, select the appropriate status for the partner program.
4. Update the rest of the fields on the Partner Program Edit page as needed.

   For information on each field, see Partner Program Fields (on page 430).
5. Save the partner program.

Managing Partner Program Memberships

You can use the Program Membership New and Edit pages to perform the following administrative tasks:

- Creating Partner Program Memberships (on page 428)
- Changing Partner Program Membership Status (on page 428)
- Deleting Partner Program Memberships (on page 428)
- Attaching Files and URLs to Records (on page 163)

Creating Partner Program Memberships

After a partner's application for membership of a partner program has been approved, the partner becomes a member of the partner program.

To create partner program memberships

1. On the Partner Program Details page for the selected partner program, click New in the Program Memberships bar.

   The Program Membership New page appears.
2. In the Partner Name field, select the name of the partner that you want to add to the partner program.
3. Complete the other fields on the Partner Membership New page as needed.

   For more information on these fields, see Program Membership Fields (on page 429).

   NOTE: The state of the Active check box and value for the Status field must be in synchronization with each other. For example, if the membership status is set to Current, then you must select the Active check box.
4. Click Save.

Changing Partner Program Membership Status

When a partner has been approved to join a partner program, and you create a new membership record for this partner program, the default status of this membership record is Current.

You can change the status of the partner program membership to one of the following values:

- Expired
- Terminated

NOTE: The state of the Active check box and value for the Status field must be in synchronization with each other. For example, if the membership status is set to Expired or Terminated, then you must deselect the Active check box.

To change the partner program membership status

1. On the Partner Program Details page, click the Edit link of the partner program membership for which you want to change status.
2. On the Program Membership edit page, select the appropriate value from the Status drop-down.
3. Click Save.

Deleting Partner Program Memberships

If you created the program membership by mistake or you want to delete it, you can do so on the Partner Program Details page.

NOTE: You cannot delete a partner program membership if the status value for the membership is set to Current.

To delete a partner program membership

1. In the Program Memberships section of the Partner Program Details page, click Delete for the partner program membership that you want to remove.

   A message box appears, asking if you are sure you want to delete the selected membership.
2. Click OK.

   The selected membership is deleted.

Program Membership Fields

Use the Program Membership New and Edit pages to add a partner program membership or update details for an existing partner program membership. You can also use the Program Membership Edit page to create new partner program memberships. The Partner Program Edit page shows the complete set of fields for a partner program.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding the fields on the Program Membership pages.

Field	Description
Key Program Membership Information	
Partner Program	The partner program to which you are adding a member.
Partner Type	The type of partner (for example, reseller, solution partner, distributor, and so on) for which this partner program is created.
Partner Name	The name of the partner you are adding to the partner program.
Program Level	The Program Level at which this partner joined the program.
Active	Indicate whether the partner program membership is Active.
ID#	The membership ID number. Oracle CRM On Demand assigns the ID.
Status	The status of the membership. The valid values are: Current, Terminated, Expired, and Renewed.
Begin Date	The date on which the partner program membership starts. This field displays the current date and time by default. You can use the calendar controls to change this date.
End Date	The date on which the partner program membership is scheduled to be completed. You can use the calendar controls to change this date.

Deleting Partner Programs

You can delete a partner program from the Partner Program Details page.

NOTE: You cannot delete a partner program if the status is set to Active.

To delete a partner program

1. On the Partner Program Details page, click Delete for the partner program you want to delete.

   A message box appears, asking if you are sure that you want to delete the selected partner program.
2. Click OK.

   The partner program is deleted.

Partner Program Fields

Use the Partner Program Edit page to add a partner program or update details for an existing partner program. You can also use this page to create new partner program memberships. This page shows the complete set of fields for a partner program.

TIP: You can also edit partners on the Partner Program List page and the Partner Program Detail page. For more information, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Administrators can also grant a partner access to these detail fields, so the partner can update the information.

The following table provides additional information regarding some fields.

Field	Description
Key Partner Program Information	
Partner Program Name	The name of the partner program. To avoid duplicate records, make sure you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on.
Status	Indicates whether the partner program is Active, Inactive, or In Progress.
Begin Date	The date on which the partner program starts. This field displays the current date and time by default. You can use the calendar controls to change this date.
End Date	The date on which the partner program is scheduled to be completed. You can use the calendar controls to change this date.
Partner Type	Determines the type of partner (for example, reseller, solution partner, distributor, and so on) for which this partner program is created.
Program Type	Determines the type of program you are creating, for example, deal registration.
MDF Allowed	Allows MDF (market development funds). Market development funds are monetary funds given by a manufacturer's sales or marketing department to help a partner sell its products or to market the manufacturer's brand. If you select MDF Allowed, any partner who is a member of this partner program is entitled to market development funds.
Special Pricing Allowed	Allows special pricing authorization. Special pricing authorization allows partners to request a special price for a product or group of products being sold. This price is usually requested so the partner can stay competitive or make a specific margin. If you select Special Pricing Allowed, any partner who is a member of this partner program is entitled to special pricing.
Deal Registration Allowed	If you select Deal Registration Allowed, any partner who is a member of this partner program is entitled to deal registration.

Field	Description
Description	Additional information about the partner program. This field has a limit of 2,000 characters.
Additional Information	
Owner Full Name	The owner of the partner program record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. To reassign ownership of a partner program record, you must have the Read/Edit access level setting for the record. The value in the Owner field affects which records are included in the reports that you or your managers run. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Applications

An *application* is the means by which a new or existing partner applies for a partnership with the brand owner. The brand owner then reviews, approves, or rejects the application. You can populate applications with data from the brand owner's portal. A partner application allows the brand owner to efficiently review, reject, and approve applications. The brand owner can also refer to application information while working in Oracle CRM On Demand.

Working with the Applications Homepage

The Applications Homepage is the starting point for managing partner applications.

NOTE: Your company administrator can customize the layout of your Applications Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an Application

You can create an application by clicking the New button in the Recently Modified Applications section. For more information, see Creating Records (on page 51) and Applications Fields (on page 436).

You can use Web services to populate applications from a partner portal. You can also use the import tool in Oracle CRM On Demand to import applications. For more information on importing applications, see Importing Applications (on page 436).

Working with Applications Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for applications.

Applications List	Description
All Applications	This list displays all records to which you have visibility, regardless of who owns the list. It does not filter applications.
All Submitted Applications	Filters applications with the status of Submitted.
All Rejected Applications	Filters applications with the status of Rejected.
All Approved Applications	Filters applications with the status of Approved.
My Applications	Filters applications with your name in the Owner field.
All Recently Created Applications	Filters applications sorted by the date on which the application was created.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing My Recently Modified Applications Section

The My Recently Modified Applications section shows the applications that you own and that were recently modified. To expand the list, click the Show Full List link.

Adding Sections to Your Applications Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Applications Homepage:

- Application Lists
- All Applications
- All Rejected Applications
- All Approved Applications
- All Submitted Applications
- My Applications
- All Recently Created Applications
- One or more report sections (Your company administrator can make report sections, such as the Applications Analytics Report, available on your Applications Homepage.)

To add sections to your Applications Homepage

1. On the Applications Homepage, click Edit Layout.
2. On the Applications Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
3. Click Save.

Managing Applications

To manage applications, perform the following tasks:

For additional procedures that are common to all records, see Working with Records (on page 46).

For step-by-step procedures that are common to many record types, see:

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Creating Applications

From Oracle CRM On Demand, you create an application by entering information in a form.

To create an application

1. From the Application List page, click New.
2. In the Application Name field, enter a name for the application that you are creating.

   TIP: Each application name must be unique.

3. In the Application Submitted By section, enter your first and last name in the appropriate fields.
4. Update the rest of the fields on the Application Edit page as needed.

   For information on each field, see Applications Fields (on page 436).

5. Save the application.

Submitting Applications for Approval

A partner application allows the brand owner to review, reject, and approve applications efficiently.

Before you begin. The application must first be created. For more information on creating applications, see Creating Applications (on page 433). A workflow rule must be created that assigns an appropriate user as the approver for applications. For more information on creating workflow rules, see Creating Workflow Rules (on page 1511).

To submit an application for approval

1 Select the application for which you want to submit an application from the All Applications section on the Applications Homepage.

 For information on selecting applications, see Finding Records (on page 74).

2 On the Applications Detail page, click the Edit button.

3 On the Applications Edit page, select Submitted from the Submission Status field. Then click Save.

 After the Submission Status field has been changed to Submitted, and the record has been saved the following occurs:

 - The approval status is set to Pending Approval.
 - The submission date is automatically set to the current timestamp.
 - The approval of the application begins. A workflow rule sets the application's Approver field to the appropriate user.
 - The approver is added to the team of the application if the approver is not already present.
 - A workflow rule sends email notifications if it has been configured to send emails.

Reviewing Applications

A brand owner must recruit suitable partners for the partner programs. When prospective partners apply for partnership, or existing partners apply for additional program memberships with the brand owner, Oracle CRM On Demand allows the brand owner to review the applications. The brand owner can then approve or reject the applications.

To review an application

1 From the Applications List page, click the name of the application that you want to review.

2 On the Applications Detail page, review the appropriate fields.

3 If you want to make changes, such as approving or rejecting an application, click Edit.

4 On the Application Edit page, make the necessary changes to the application. Then click Save.

Approving Applications

Brand owners can use Oracle CRM On Demand to approve partner applications that they consider to be acceptable.

NOTE: You can approve only partner applications for which you are designated the current approver.

To approve a partner application

1 From the Applications List page, click the name of the partner application that you want to approve.

2 On the Application Details page, click Edit.

3 Change the Approval Status to Approved, then click Save.

Rejecting Applications

As an application goes through the approval chain, an approver can reject the application.

Before you begin. The application must have the submission status of Submitted.

To reject an application

1 Select the application that you want to reject from the All Applications section on the Applications Homepage.

For information on selecting applications, see Finding Records (on page 74).

2 On the Application Detail page, click the Edit button.
3 On the Application Edit page, select Rejected from the Approval Status field. Then click Save.

   When you change the approval status to Rejected and click Save, the following occurs:

   - The submission status of the registration remains in the Submitted state.
   - The date is removed from the Approved Date field. However, the submitted date remains in the Submitted Date field.

     Note: If the application has not been approved, no date appears in the Approved Date field.

   - A workflow rule creates a new task record to track the return action of the approver if the workflow rule has been configured.
   - A workflow rule sends appropriate email notifications if it has been configured to send emails.

Recalling Applications

As an application goes through the approval chain, a partner can recall the application.

Before you begin. The application must have the submission status of Submitted and the approval status of Pending Approval.

To recall applications

1 Select the application that you want to recall from the All Applications section on the Applications Homepage.

   For information on selecting applications, see Finding Records (on page 74).

2 On the Application Detail page, click the Edit button.
3 On the Application Edit page, select Recalled from the Submission Status field. Then click Save.

   When you change the submission status to Recalled, the following occurs:

   - The approver status is reset to blank.
   - A workflow rule creates a new task to track the approval action if the workflow rule has been configured.
   - A workflow rule sends appropriate email notifications if it has been configured to send emails.

Canceling Applications

As an application goes through the approval chain, an approver can cancel the application.

Before you begin. The application must have an approval status of Approved.

To cancel an application

1 Select the application that you want to cancel from the All Applications section on the Applications Homepage.

   For information on selecting applications, see Finding Records (on page 74).

2 On the Applications Detail page, click the Edit button.
3 On the Applications Edit page, select Cancelled from the Approval Status field. Then click Save.

Deleting Applications

You can delete an application from the Application Details page.

To delete an application

1 On the Application Details page, click Delete.

A message box appears, asking if you are sure that you want to delete the application.

2 Click OK.

The application is deleted.

Importing Applications

In most cases, brand owners choose to populate initial partner applications from another source. Brand owners can populate partner applications by using the Import tool in Oracle CRM On Demand, or they can use Web services to load application data from a partner portal. For more information on importing data using Oracle CRM On Demand, see Importing Your Data (on page 1827).

Applications Fields

Use the Applications Edit page to add an application or update details for an existing application. The Applications Edit page shows the complete set of fields for an application.

TIP: You can also edit applications on the Applications List page and the Applications Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Company Profile	
Name	The name of the company. To avoid duplicate records, make sure that you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on.
Location	The location of the company.
Main Phone #	The primary phone number of the company.
Main Fax #	The primary fax number for the company.
Web Site	URL address for the company.
Number of Employees	The total number of employees in the company.
Annual Revenue	The total annual revenue for the company.
Industry	The industry in which the company competes.
Country	The country portion of the company's address.
Address 1	Additional information for the company's address.

Field	Description
Address 2	Additional information for the company's address.
City	The city portion of the company's address.
Province	The state or province portion of the company's address.
Post Code	The postal code portion of the company's address.
Application Submitted by	
First Name	The submitter's first name.
Last Name	The submitter's last name.
Work Phone #	The submitter's work phone number.
Cellular Phone #	The submitter's cellular phone number.
Work Fax #	The submitter's work fax number.
Email Address	The submitter's email address.
Job Title	The submitter's job title.
Submission Status	The current submission status of the application. The values are: Not Submitted, Submitted, or Recalled.
Current Approver	The name of the person who has the authority to approve the application.
Country	The country portion of the submitter's address.
Address 1	Additional information for the submitter's address.
Address 2	Additional information for the submitter's address.
City	The city portion of the submitter's address.
Province	The state or province portion of the submitter's address.
Post Code	The postal code of the submitter's address.
Partnership Information	
Approval Status	The current approval status for the application. The values are: Pending Approval, Approved, Rejected, or Cancelled.

Field	Description
Submitted Date	The date on which the application was submitted.
Approved Date	The date on which the application was approved.
Processed By: Name	The name of the person who has reviewed and either accepted or rejected this application.
Reject Reason	The reason why the application was rejected. The values are: Duplicate, Incorrect Information, Insufficient Information, or Other.
Partner Program	The name of the partner program associated with the application.
Program Level	The level of the partner program associated with the application.
Partner Type	The type of partner for which the application is being submitted.
Expected Partnership Benefits	The expected benefits from this partnership. It is a text field with a limit of 500 characters.
Existing Partnerships	This field lists any existing partnerships. It is a text field with a limit of 300 characters.
Additional Information	
Partner	The partner who is associated with this application.
Source	The source from where this application comes, for example, Web site, direct mail, email, and so on.
Campaign	The campaign that resulted in this partner application. This campaign is associated with this application.
Application ID	The unique identification (ID) number for this application.
Owner	The owner of the application record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Deal Registrations

Deal registration is a process by which partners request exclusive rights to an opportunity from the brand owner. It provides partners with the means to inform the vendor about a potential opportunity, and then partners receive priority for that opportunity. Deal registrations are less speculative than leads but more speculative than opportunities, so they are considered to exist between leads and opportunities.

In most cases, a partner requests registration of a lead or opportunity that the partner discovered. However, the partner can also request registration of an opportunity that was previously offered to the partner by the brand owner.

Deal registrations help mitigate channel conflict, where partners have to compete against one another or the vendor's internal sales department for the same opportunity. Deal registrations are also beneficial in the following ways:

- They enhance the brand owner's visibility of the opportunity pipeline of the partners.
- They increase the brand owner's ability to upsell or cross-sell or both.

When registering a deal, the partner might not have enough information about the opportunity. For example, the partner might not know the exact nature of the products that the prospect intends to purchase. The partner might have only a vague idea of the prospect's interest, for example, *high-end servers* rather than a definitive picture of the prospect's shopping list. Therefore, when registering deals, partners can provide as little or as much information as they want.

Working with the Deal Registration Homepage

The Deal Registration Homepage is the starting point for managing deal registrations.

NOTE: Your company administrator can customize the layout of your Deal Registration Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Deal Registration

You can create a deal registration by clicking the New button in the Recently Viewed Registrations Waiting for My Approval section. For more information, see Creating Records (on page 51) and Deal Registration Fields (on page 448).

Working with Deal Registration Lists

The Deal Registration Lists section shows a number of filtered lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following are some of the sections that can be displayed on your Deal Registration Homepage.

Deal Registration Lists	Description
All Deal Registrations	This list displays all records to which you have visibility, regardless of who owns the record. It does not filter deal registrations.
Recently Modified Deal Registrations	Filters all deal registrations, sorted by the modified date.
Recently Created Deal Registrations	Filters all deal registrations, sorted by the created date.
Recently Viewed Deal Registrations	Filters all deal registrations, sorted by the order of the most recently viewed.

Deal Registration Lists	Description
Deal Registrations expiring in the Next 30 Days	All approved deal registrations with an expiration date that falls within the next 30 calendar days from the present date.
Deal Registrations Waiting for My Approval	All deal registrations with the approval status of Pending Approval for which you are the current approver.
Deal Registrations with no Activity in the Past 30 Days	All approved deal registrations that have seen no activity on the associated opportunity within the past 30 calendar days from the present date.
Active Deal Registrations	All deal registrations with an approval status of Approved.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Deal Registrations Waiting for My Approval

The Deal Registrations Waiting for My Approval section shows all deal registrations for which you are the current approver, but have not yet approved.

Other Sections

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Deal Registration Homepage:

- Approved Deal Registrations
- Deal Registrations Expiring in the Next 30 Days
- Deal Registrations with no Activity in the Past 30 Days
- Recently Created Deal Registrations
- Recently Modified Deal Registrations
- Active Deal Registrations
- One or more report sections [Your company administrator can make report sections, such as the Approved Registrations by Deal Size (Bar chart), Approved Registrations by Age (Bar chart), Registrations by Status (Pie chart), Registrations resulting in Win (By Period) (Bar chart), or Number (#) of registrations (By Period) (Bar chart).]

Adding Sections to Your Deal Registration Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Deal Registration Homepage, depending on which sections your company administrator has made available for display on your Deal Registration Homepage.

To add sections to your Deal Registration Homepage

1 On the Deal Registration Homepage, click Edit Layout.

2 On the Deal Registration Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page. Then click Save.

Managing Deal Registrations

To manage deal registrations, perform the following tasks:

Creating Deal Registrations

From within Oracle CRM On Demand, partners create a deal registration by entering information in a form. The partner can access this form from different areas within the application, depending on what the partner is working on and what the partner wants to do. This topic describes one method of creating a deal registration from the Deal Registrations tab. Partners can also create deal registrations using other methods, see Creating Records (on page 51).

When a partner creates a deal registration, the partner can either make it independent or associate it with an opportunity. The partner creates an independent deal registration (stand-alone registration) when the partner believes he or she has discovered a potential new business opportunity and wants to register it with the brand owner. However, the brand owner might not consider it an opportunity until it has been verified by one or more persons in the organization.

In this case, when the partner believes he or she has discovered an opportunity, and the brand owner contends that it is not an opportunity until it has been verified and confirmed, the solution is for the partner to create a deal registration. The deal registration contains both opportunity as well as registration information. At some point, the partner submits the registration for approval and, if it is appropriate, the brand owner approves it. Prior to giving final approval for the deal registration, the brand owner associates it with an opportunity.

To create a deal registration

1. From the Deal Registration List page, click New.
2. In the Deal Registration Detail form, enter the required information.
   a. If the deal registration is for an existing opportunity, search for and select the appropriate opportunity in the Associated Opportunity field. The Associated Opportunity field should display only those opportunities to which you have visibility. The customer field is automatically populated with the name of the customer associated with the selected opportunity.

b If the deal registration is for a new opportunity (or for an opportunity to which you do not have visibility), select the New Opportunity check box, and enter the following information in the Opportunity Information section.

- Currency
- Deal size
- Close date
- Product interest
- Next step

c If the deal registration is for a new opportunity, it might be for an existing customer or a new customer. If the deal registration is for an existing customer, search for and select the customer from the Associated Customer field. If the deal registration is for a new customer, select the New Customer check box, and complete the fields in the New Company information section.

For more information about Deal Registration fields, see Deal Registration Fields (on page 448).

3 Save the record.

Submitting Deal Registrations for Approval

A *deal registration* is a request from a partner to the brand owner for exclusive rights to an opportunity. The request might or might not be granted by the brand owner. Most companies have well-defined processes to handle such requests for approval from partners. Typically, one or more employees of the brand owner evaluate the registration on a variety of criteria and decide whether to approve the request. In small companies, the employees who must approve a registration remain static; that is, the same set of approvers approve all deal registrations. However, in larger companies, the group of approvers who must approve a registration is dynamic and is based on a variety of factors, such as the deal size, partner, products, and so on.

Before you begin. Create the deal registration. For more information on creating deal registrations, see Creating Deal Registrations (on page 441). Create a workflow rule that assigns an appropriate user as the approver of deal registrations. For more information on creating workflow rules, see Creating Workflow Rules (on page 1511).

To submit deal registrations for approval

1 In the Submission Status field on the Deal Registrations Edit page, select Submitted.

Changing the submission status to Submitted starts the approval process. Anyone who has update access to the deal registration can start the approval process.

2 Click Save.

After the Submission Status field has been changed to Submitted the following occurs:

- The approval status is set to Pending Approval.
- The submission date is automatically set to the current timestamp.
- The routing of the registration begins. A workflow rule sets the Approver field of the deal registration to the appropriate user.
- The approver is added to the team of the deal registration if the approver is not already present.
- A workflow rule sends any email notifications if the workflow rule has been configured.

Approving Deal Registrations

Depending on the business processes for your company, more than one person within your company might be required to approve a deal registration before the deal registration is considered a valid opportunity. Currently, approval routing is a manual process and only one level of approval is supported. You must modify the current approver field to move the registration along the approval chain.

Note: You can achieve multilevel approval when each approver in the approval chain updates the Approver field for the next approver in the chain.

A deal registration can be given final approval only if it is associated with an opportunity. If the registration is not associated with an opportunity (for example, it is a stand-alone registration), it has to be linked to an existing opportunity or has to be manually converted to an opportunity. For more information on converting a deal registration to an opportunity, see Converting Deal Registrations to Accounts, Contacts, or Opportunities (on page 446). When a deal registration achieves final approval, the opportunity associated with it becomes visible to the partner organization, because it might be necessary for the partner user to access the opportunity.

Note: The associated opportunity becomes visible to the partner organization only upon approval of the deal registration. When the registration is either returned or rejected, the visibility to the associated opportunity (if any) is not granted.

Before you begin. The submission status of the deal registration must be set to Submitted before you can approve it.

To approve deal registrations

1. In the Approval Status field on the Deal Registration Edit page, select Approved.
2. Click Save.

   When you change the approval status to Approved, the following occurs:

   - Oracle CRM On Demand validates that the submission status value is Submitted. If the submission status is any other value, the validation fails, and an appropriate error message is generated.
   - Oracle CRM On Demand validates that the Associated Opportunity field is populated with an opportunity.
   - Oracle CRM On Demand validates that the opportunity specified in the Associated Opportunity field is not already associated with an approved deal registration.
   - The Registered check box on the opportunity header is selected.
   - The Registration Expiration Date field on the opportunity header is populated with the expiration date for approved registration.
   - The partner information from the approved registration is copied to the opportunity header.
   - The final approver changes to the current user. The Current Approver field is not updated.
   - The approved date changes to the current date on Oracle CRM On Demand.
   - A workflow rule creates a new task to track the approval action.
   - A workflow rule sends the appropriate email notifications if the workflow rule has been configured.

Returning Deal Registrations

As a deal registration goes through the approval chain, an approver can return the registration to the creator to make changes to the deal registration parameters.

Before you begin. The deal registration must have a submission status of Submitted.

To return deal registrations

- In the Approval Status field on the Deal Registration Edit page, select Returned. Then click Save.

  When you change the approval status to Returned, the following occurs:

  - The submission status of the registration is set to Not Submitted.
  - The date is removed from the Approved Date field. However, the submitted date remains in the Submitted Date field.
  - A task record is created to track the return action of the approver.
  - A workflow rule sends the appropriate email notifications if the workflow rule has been configured.

The creator of the deal registration can now update the deal registration and resubmit it. For more information on submitting deal registrations, see Submitting Deal Registrations for Approval (on page 442).

Rejecting Deal Registrations

As a deal registration goes through the approval chain, an approver can reject the deal registration.

Before you begin. The deal registration must have a submission status of Submitted.

To reject deal registrations

- In the Approval Status field on the Deal Registration Edit page, select Rejected. Then click Save.

  When you change the approval status to Rejected, the following occurs:

  - The submission status of the registration remains in the Submitted state.
  - The date is removed from the Approved Date field. However, the submitted date remains in the Submitted Date field.
  - A task record is created to track the return action of the approver.
  - A workflow rule creates the appropriate email notifications if the workflow rule has been configured.

Resubmitting Deal Registrations

As a deal registration goes through the approval process, the approver might require additional information to approve or reject the registration. In such cases, the approver can return the registration to the owner and specify a reason for the return. Alternatively, the owner of the registration might recall the registration in order to supply additional information.

After the registration has been returned or recalled, the owner can update it. After the owner updates the deal registration, he or she can resubmit it for approval.

Before you begin. The submission status for the deal registration must be either Recalled or Not Submitted.

To resubmit deal registrations for approval

1. On the Deal Registration Edit page, add the additional information.
2. In the Submission Status field on the Deal Registrations Edit page, select Submitted.

   Changing the submission status to Submitted starts the approval process. Anyone who has update access to the deal registration can start the approval process. Then click Save.

   When the Submission Status field has been changed to Submitted the following occurs:

   - The approval status is set to Pending Approval.
   - The submission date is automatically set to the current timestamp.
   - The routing of the registration begins. A workflow sets the Approver field for the deal registration to the appropriate user.
   - The approver is added to the team of the deal registration if the approver is not already present.
   - A workflow rule sends the appropriate email notifications if the workflow rule has been configured.

Canceling Deal Registrations

The brand owner can cancel deal registrations when the Approval Status field is set to either of the following:

- Pending approval
- Approved

Canceling a deal registration is not supported when the approval status is any other value.

To cancel deal registrations

- In the Approval Status field on the Deal Registration Edit page, select Cancelled. Then click Save.

  When an approved deal registration is canceled, the following updates are made to the associated opportunity:

  - The Registered check box is not selected.
  - The Registration Expiration Date field changes to a null value.
  - The Registered Partner field changes to a null value.

Ending the Period for Deal Registrations

You can end the period for a deal registration at any time, provided that both of the following conditions are met:

- The Submission Status field on the deal registration record is currently set to Submitted.
- The Approval Status field on the deal registration record is currently set to Approved.

To end the period for a deal registration

- In the Approval Status field on the Deal Registration Edit page, select Expired. Then click Save.

When you change the approval status to Expired, the following occurs:

- The Registered check box on the opportunity header is not selected.
- The date in the Registration Expiration Date field on the opportunity header returns to a null value.
- The Registered Partner field on the opportunity header returns to a null value.

Updating Deal Registrations

You do not always have all the information you require when first creating a deal registration. Additionally, you can add product information to a registration only after the deal registration has been created. So, Oracle CRM On Demand allows you to view and modify a deal registration for which you have visibility.

When a deal registration has the status of Not Submitted or Recalled, you can edit the registration, or add or remove revenue line items. When a deal registration has any other status, you cannot make these changes.

To update a deal registration

1. On the Deal Registration List page, click Edit.
2. On the Deal Registration Edit page, make the changes that you want to the deal registration. Then click Save.

Linking Products to Deal Registrations

When you register a new opportunity you have some idea of the type and quantity of products that the prospect is interested in. It is important to save this information about the deal registration, because many companies look at the products while considering approval of the registration. Because a deal registration might be converted to an opportunity before final approval, it is important to save the product line information on the deal so that this information can be copied to the opportunity at the time of conversion.

Before you begin. Your company administrator must have made the Product Revenues related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

Create the deal registration, and set the status to Not Submitted or Recalled. You can add product lines to the deal registration after creating the registration but before submitting it for approval.

To link products to deal registrations

1. In the Product Revenues section of the Deal Registration Detail page, click Add.
2. In the fields, enter the product name, quantity, and price for the product that you want to link to the deal registration. Then click Save.

   For more information on linking records, see Linking Records to Your Selected Record (on page 117).

Calculating the Deal Size

A deal registration might have zero, one, or more product line items associated with it. Each product line item might have a revenue value associated with it. You can set the deal size on the deal registration header to be the total of all the revenue line items, using the appropriate currency conversion.

Before you begin. Your company administrator must have made the Product Revenues related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To calculate the deal size

1. In the Product Revenues section of the Deal Registration Details page, click Update Deal Size.

   Oracle CRM On Demand fetches the revenue from each line item and converts it to the deal currency (specified on the registration header). While performing the conversion, Oracle CRM On Demand considers the exchange date on the line item. If an exchange date has been specified for the line item, then the exchange rate on that date is used while performing the conversion. If no exchange date has been specified, then Oracle CRM On Demand uses the current date for the conversion calculations.

   The converted revenue from each line item is added to a running total, and the resulting value is populated in the Deal Size field on the registration header.
2. Click Save.

Associating Deal Registrations with Opportunities

Oracle CRM On Demand allows you to associate existing deal registrations with existing opportunities and to change existing associations between the two. Also, a deal registration might be associated with an incorrect opportunity.

To associate a deal registration with an opportunity

1. On the Deal Registrations List page, click Edit for the deal registration that you want to work with.
2. In the Associated Opportunity field on the Deal Registrations Edit page, search for and select the opportunity that you want to associate the deal registration with. Then click Save.

Converting Deal Registrations to Accounts, Contacts, or Opportunities

If your user role has the appropriate setup, you can create account, contact, and opportunity records, or merge deal registration information with existing records by converting the deal registration record. Depending on your company's settings, the new opportunity record can include information that affects revenue calculations.

Before you begin. You must do the following tasks:

- Create the deal registration. For more information on creating deal registrations, see Creating Deal Registrations (on page 441).
- Set up your user role and access profile settings. For more information about these settings, see Access Profile and Role Settings for Converting Deal Registrations (on page 447).

To convert a deal registration to an account, contact, or opportunity

1. Select the deal registration that you want to convert from the All Deal Registrations section on the Deal Registration homepage.

   For information on selecting deal registrations, see Finding Records (on page 74).
2. On the Deal Registration Detail page, click the Convert to Opportunity button.
3. On the Convert Deal Registration page, do one of the following:
   - To create new account and contact records for this deal registration, select the Auto-Create New Account and Auto-Create New Contact options.

     In the Account section, the Associated Company field for the deal registration appears in the Associated Account field by default. In the Contact section, the first name and last name for the deal registration appear by default.
   - To create a new opportunity and link the opportunity to an existing account and contact, select the Use Existing Account and Use Existing Contact options.

     If the registration record has an associated account, this account appears in the Associated Account field. If the registration record has an associated contact, this contact appears in the Associated Contact field.
   - To link the deal registration to a different account or contact, click the Lookup icon next to the Associated Account or Associated Contact fields, and select another account and contact. Make sure the correct names appear in the Associated Account and Associated Contact fields and that the Use Existing Account and Use Existing Contact options are selected.
4. To convert the deal registration to an opportunity, select Auto-Create Opportunity, and complete the fields.

   The name of the deal registration appears in the Opportunity Name field by default. Data in the revenue, close date, next step, and description fields are also carried over to the opportunity record. You can edit this data in the Convert Deal Registration page. You can also associate the deal registration with an existing opportunity. To do so, do the following:
   a. Select the Use Existing Opportunity option
   b. Select the appropriate opportunity by using the Lookup icon next to the Associated Opportunity field.
5. To convert the deal registration, click Save.

Access Profile and Role Settings for Converting Deal Registrations

To convert deal registrations to accounts, contacts, or opportunities, you must have the appropriate settings in your access profiles and in your user role. This topic describes the required settings.

Access Profile Settings for Converting Deal Registrations

The access levels that allow you to convert deal registrations are shown in the following tables. These settings are required on both your default-access profile and your owner-access profile.

The following table shows the access-levels for record types that allow you to convert deal registrations.

Record Type	Access Level
Account	Read and Edit
Contact	Read and Edit
Deal Registration	Read and Edit
Opportunity	Read and Edit

The following table shows the access-levels for related information record types that allow you to convert deal registrations.

Record Type	Related Information Record Type	Access Level
Account	Addresses	Read, Create, and Edit
Contact	Accounts	Read and Create
	Addresses	Read, Create, and Edit
Opportunity	Revenue	Read and Edit
	Contact	Read and Create

User Role Settings for Converting Deal Registrations

The role settings that allow you to convert deal registrations are as follows:

- The role must have the Convert Deal Registrations privilege.
- The record-type access for the role must have the following settings:
  - The Has Access check box must be selected for the Deal Registration record type in all cases of deal registration conversion.
  - To convert (that is, associate or link) deal registrations to existing opportunities, the Has Access check box must be selected for the Opportunity record type.
  - To convert deal registrations to new opportunities, the Has Access and Can Create check boxes must be selected for the Opportunity record type.
  - To convert deal registrations to existing accounts, the Has Access check box must be selected for the Account record type.
  - To convert deal registrations to new accounts, the Has Access and Can Create check boxes must be selected for the Account record type.
  - To convert deal registrations to existing contacts, the Has Access check box must be selected for the Contact record type.
  - To convert deal registrations to new contacts, the Has Access and Can Create check boxes must be selected for the Contact record type.

NOTE: For more information on configuring Partner Relationship Management, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*.

Deal Registration Fields

Use the Deal Registration Edit page to add a deal registration or update details for an existing deal registration. The Deal Registration Edit page shows the complete set of fields for a deal registration.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Deal Registration Key Information	

Field	Description
Name	The name of the deal registration. To avoid duplicate records, make sure you follow the naming conventions your company has set up for abbreviations, capitalization, and so on.
Type	The type of deal registration. The options include: Standard and Non-Standard.
Submission Status	The submission status of the deal registration. The options include: Not Submitted, Submitted, and Recalled.
Expiration Date	The date on which the deal registration will expire.
Special Price Reqd.	Indicates whether special pricing is required for the deal registration.
Associated Lead	A unique identifier for the lead that resulted in the deal registration.
ID	The unique identifier (ID) for the deal registration.
Principal Partner	The partner account that discovered the deal registration. The partner who discovered the deal registration might no longer own it.
Principal Partner: Location	The location of the originating partner account.
Partner Program	The partner program to which the deal registration is attached.
Objective	The objective associated with deal registration.
Support Reqd.	Indicates whether presales support is required for the deal registration.
Opportunity Information	
Associated Opportunity	The name of the opportunity with which the deal registration is associated.
New Opportunity	Indicates whether the opportunity associated with the deal registration is a new one.
Currency	The selected currency for the opportunity with which the deal registration is associated.
Deal Size	The size of the deal in the units of the selected currency.
Close Date	The close date for the opportunity with which the deal registration is associated.
Product Interest	The product area in which the prospective customer is interested.

Field	Description
Next Step	The next logical step in the selling process for the opportunity associated with the deal registration.
Customer Information	
Associated Customer	The name of the customer organization associated with the deal registration.
New Customer	Indicates whether the deal registration is for a new customer organization.
Company Name	The name of the customer organization.
Country	The country in which the customer organization is based.
Street	The customer organization's street address.
City	The city in the customer organization's address.
State	The state in the customer organization's address.
Postal Code	The postal code of the customer organization's address.
Associated Contact	The name of an associated contact.
New Contact	Indicates whether this is a new contact.
Mr./Mrs.	Indicates the appropriate salutation designation.
First Name	The customer's first name.
Middle Name	The customer's middle name.
Last Name	The customer contact's last name.
Job Title	The customer contact's job title.
Email	The customer contact's email address.
Telephone #	The customer contact's telephone number.
Cell Phone	The customer contact's cell phone number.
Fax	The customer contact's fax number.
Approval Information	

Field	Description
Approval Status	The current status of the deal registration approval.
Current Approver	The name of the person who must approve the deal registration next.
Final Approver	The name of the person who granted final approval to the deal registration.
Submitted Date	The date on which the deal registration was submitted for approval.
Approved Date	The date on which the deal registration was finally approved.
Reject Reason	The reason for rejecting approval of the deal registration.
Description	Additional information about the deal registration. This field has as a limit of 250 characters.
Additional Information	
Owner	The owner of the deal registration record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run in the Analytics pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Owner Partner Account	The name of the partner account that owns the deal registration.
Originating Partner Account	The name of the partner account that discovered the deal registration. The partner who discovered the deal registration might no longer own it
Description	Enter any additional information about the deal registration.

MDF Requests

Market development funds (MDF) provide brand owners with the ability to make marketing funds available to a partner in an organized way, so that a partner can sell the brand owner’s products in specific geographical areas or so that a partner can market its brand. An *MDF request* is a request for funds in which a partner asks the brand owner for funds.

Partners can request preapprovals to fund marketing activities. The MDF requests identify the details of the marketing activity and its estimated cost. The MDF request is then routed through an approval process. The brand owner provides the approved funds for the MDF request and can approve, reject, or return it.

After the marketing activities have been completed, partners can create claims to redeem the spent money that was preapproved by the brand owner. Claims are either created against a specific MDF request or can exist independently. An MDF request can have only one claim associated with it. When the claim is approved, the fund is debited with the associated MDF request.

Working with the MDF Requests Homepage

The MDF Request Homepage is the starting point for managing market development funds (MDF) requests.

NOTE: Your company administrator can customize the layout of your MDF Request Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an MDF Request

You can create an MDF request by clicking the New button in the Recently Modified MDF Request section. For more information, see Creating Records (on page 51) and MDF Fields.

Working with MDF Request Lists

The MDF Request Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for MDF Requests.

MDF Request List	Description
All MDF Requests	This list displays all records to which you have visibility, regardless of who owns the list. It does not filter MDF requests.
Recently Created MDF Requests	Filters all MDF requests, sorted by the created date.
Recently Modified MDF Requests	Filters all MDF requests, sorted by the modified date.
My MDF Requests	Filters MDF requests with your name in the Owner field.
My Recently Created MDF Requests	Filters MDF requests with your name in the Owner field, sorted by the created date.
My Recently Modified MDF Requests	Filters MDF requests with your name in the Owner field, sorted by the modified date.
All Pending MDF Requests	All MDF Requests with the approval status of Pending Approval or the claim status of Claim Submitted.
My Pending MDF Requests	MDF requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted.
My Approved MDF Requests	All approved MDF requests that you own.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing My Recently Modified MDF Requests Section

The My Recently Modified MDF Requests section shows the MDF requests that you own and that were recently modified. To expand the list, click the Show Full List link.

Viewing My Pending MDF Requests Section

The My Pending MDF Requests section shows all of the MDF requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted. To expand this list, click Show Full List.

Adding Sections to Your MDF Request Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your MDF Requests Homepage:

- MDF Request Lists
- All Pending MDF Requests
- Recently Created MDF Requests
- Recently Modified MDF Requests
- My Pending MDF Requests
- My Approved MDF Requests
- My Recently Created MDF Requests
- My Recently Modified MDF Requests
- MDF Requests Pending My Approval

To add sections to your MDF Requests Homepage

1. On the MDF Requests Homepage, click Edit Layout.
2. On the MDF Requests Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing MDF Requests

To manage MDF requests, perform the following tasks:

- Submitting MDF Requests for Approval (on page 454)
- Recalling MDF Requests (on page 454)
- Returning MDF Requests (on page 455)
- Rejecting MDF Requests (on page 455)
- Approving MDF Requests (on page 456)
- Canceling MDF Requests (on page 456)
- Submitting Claims for MDF Requests (on page 457)
- Rejecting Claims for MDF Requests (on page 457)
- Approving Claims for MDF Requests (on page 458)

For additional procedures that are common to all records, see Working with Records (on page 46).

For procedures that are common to many record types, see the following:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Working with Attachments (on page 161)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Submitting MDF Requests for Approval

Partners can request preapproval for the funding of marketing activities by submitting a market development fund (MDF) request. The MDF request includes the details of the activity and amount of funds that the partner estimates will be spent.

Before you begin. Create the MDF request. Create a workflow rule that assigns an appropriate user as the approver for MDF requests. For more information on creating workflow rules, see Creating Workflow Rules (on page 1511).

To submit an MDF request for approval

1. Select the MDF request that you want to submit for approval from the All MDF Requests section on the MDF Request homepage.

   For information on selecting MDF requests, see Finding Records (on page 74).
2. On the MDF Request Detail page, click the Edit button.
3. On the MDF Request Edit page, select Submitted from the Submission Status field. Then click Save.

   After you change the Submission Status field value to Submitted and save the record, the following occurs:
   - The approval status is set to Pending Approval.
   - The Submitted Date is automatically set to the current timestamp.
   - The routing of the MDF request begins. A workflow rule sets the Approver field for the MDF request to the appropriate user.
   - The approver is added to the team of the MDF request, if the approver is not already present.
   - A workflow rule sends email notifications.

The MDF request appears on the list of records waiting for the approver's actions and becomes read-only for the partner (owner). Further updates to the request (for example, updating the requested amounts, changing the associated fund, and so on) are not permitted. The partner can make changes to a submitted MDF request only after recalling it successfully.

Recalling MDF Requests

After a market development fund (MDF) request has been submitted, and before it has been approved, you can recall it. After you have successfully recalled the request, you can continue updating it and resubmit it for approval.

Before you begin. The MDF request must have the submission status of Submitted and the approval status of Pending Approval.

To recall an MDF request

1. Select the MDF request that you want to recall from the All MDF Requests section on the MDF Request homepage.

   For information on selecting MDF requests, see Finding Records (on page 74).
2. On the MDF Request Detail page, click the Edit button.
3. On the MDF Request Edit page, select Recalled from the Submission Status field. Then click Save.

   When you change the submission status to Recalled, the following occurs:
   - The Approval Status is reset to a null value.
   - A workflow rule creates a new task to track the action (if configured).
   - A workflow rule sends the appropriate email notifications (if configured).

You can now update the MDF request and resubmit it. For more information on submitting requests, see Submitting MDF Requests for Approval (on page 454).

Returning MDF Requests

As a market development fund (MDF) request goes through the approval chain, an approver can return it to the owner to make changes or provide additional information.

Before you begin. The MDF request must have the submission status of Submitted.

To return an MDF request

1. Select the MDF request that you want to return from the All MDF Requests section on the MDF Request homepage.

   For information on selecting MDF requests, see Finding Records (on page 74).
2. On the MDF Request Detail page, click the Edit button.
3. On the MDF Request Edit page, select Returned from the Approval Status field. Then click Save.

   When you change the approval status to Returned and click Save, the following occurs:
   - The submission status of the MDF request is set to Not Submitted.
   - The date is removed from the Pre-Approval Date field. However, the submitted date remains in the Submitted Date field.
   - A task record is created to track the return action of the approver.
   - A workflow rule sends the appropriate email notifications.

The owner of the MDF request can now update the request and resubmit it. For more information on submitting MDF requests, see Submitting MDF Requests for Approval (on page 454).

Rejecting MDF Requests

As a market development fund (MDF) request goes through the approval chain, an approver can reject it if the requested amount for the marketing activity cannot be granted.

Before you begin. The MDF request must have the submission status of Submitted.

To reject a MDF request

1. Select the MDF request that you want to reject from the All MDF Requests section on the MDF Request homepage.

   For information on selecting MDF requests, see Finding Records (on page 74).
2. On the MDF Request Detail page, click the Edit button.
3. On the MDF Request Edit page, select Rejected from the Approval Status field. Then click Save.

When you change the approval status to Rejected and click Save, the following occurs:

- The submission status of the MDF request remains in the Submitted state.
- The date is removed from the Pre-Approval Date field. However, the submitted date remains in the Submitted Date field.
- A task record is created to track the return action of the approver.
- A workflow rule sends the appropriate email notifications.

After the MDF request has been rejected, it becomes read-only for the owner and further updates to it are not permitted.

Approving MDF Requests

An approver can pre-approve a MDF request and allocate funds to the requested marketing activity. Currently, approval routing for MDF requests is a manual process and only one level of approval is supported.

NOTE: You can achieve multilevel approval when each approver in the approval chain updates the Approver field for the next approver in the chain.

Before you begin. The submission status of the MDF request must be set to Submitted before you can approve it.

To approve an MDF request

1. Select the MDF request that you want to approve from the All MDF Requests section on the MDF Request homepage.

   For information on selecting MDF requests, see Finding Records (on page 74).
2. On the MDF Request Detail page, click the Edit button.
3. On the MDF Request Edit page, enter an amount in the Amount PreApproved field.
4. Select Approved from the Approval Status field. Then click Save.

   When you change the approval status to Approved, the following occurs:

   - Oracle CRM On Demand validates that the submission status value is Submitted. If the submission status is any other value, the validation fails and an appropriate error message is generated.
   - Oracle CRM On Demand validates that the amount preapproved does not exceed the approval Limit set for the current approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is generated.
   - The Last Approved By field changes to the current user. The Current Approver field is not updated.
   - The preapproval date changes to the current date on Oracle CRM On Demand.
   - A workflow creates a new task to track the approval action
   - A workflow sends the appropriate email notifications.

After the MDF request has been approved, it becomes read-only, and further updates to it are not permitted except when submitting a related claim or extending the expiration date.

Canceling MDF Requests

The brand owner can cancel a market development fund (MDF) request at any point if the MDF request is no longer valid.

Before you begin. The approval status of the MDF request must be set to Approved.

To cancel an MDF request

1. Select the MDF request that you want to cancel from the All MDF Requests section on the MDF Request homepage.

   For information on selecting MDF requests, see Finding Records (on page 74).
2. On the MDF Request Detail page, click the Edit button.
3. On the MDF Request Edit page, select Cancelled from the Approval Status field. Then click Save.

   When you change the approval status to Cancelled, the following occurs:
   - Oracle CRM On Demand validates that the approval status is set to Approved.
   - A workflow rule creates a new task to track the action.
   - A workflow sends the appropriate email notifications.

After the MDF request has been cancelled, it is read-only, and further updates to it are not allowed.

Submitting Claims for MDF Requests

Partners create claims to redeem the pre-approved money that was spent on marketing activities. Claims are either created against a specific market development fund (MDF) request or can exist independently.

To submit a claim for an MDF request

1. Select the MDF request for which you want to submit a claim from the All MDF Requests section on the MDF Request homepage.

   For information on selecting MDF requests, see Finding Records (on page 74).
2. On the MDF Request Detail page, click the Edit button.
3. On the MDF Request Edit page, enter the amount in the Total Claim Amount Requested field.
4. From the Claim Status field, select Claim Submitted. Then click Save.

   After the Claim Status field has been changed to Claim Submitted and the record has been saved the following occurs:
   - The routing of the MDF request claim begins.
   - A workflow rule sets the Approver field of the MDF request to the appropriate user.
   - The approver is added to the team of the MDF request if the approver is not already present.
   - A workflow rules sends the appropriate email notifications.

Rejecting Claims for MDF Requests

As a market development fund (MDF) claim goes through the approval chain, an approver can reject it.

Before you begin. The MDF claim must have the claim status of Claim Submitted.

To reject a claim for an MDF request

1. Select the MDF request for which you want to reject a claim from the All MDF Requests section on the MDF Request homepage.

   For information on selecting MDF requests, see Finding Records (on page 74).
2. On the MDF Request Detail page, click the Edit button.
3. On the MDF Request Edit page, select Claim Denied from the Claim Status field. Then click Save.

When you change the claim status to Claim Denied and click Save, the following occurs: a workflow rule sends the appropriate email notifications.

Approving Claims for MDF Requests

An approver can approve a market development fund (MDF) claim and offer a credit to the partner. Only one level of approval is currently supported for MDF claims.

Before you begin. The submission status of the MDF claim must be set to Claim Submitted before you can approve it.

To approve a claim for an MDF request

1. Select the MDF request for which you want to approve a claim from the All MDF Requests section on the MDF Request homepage.

   For information on selecting MDF requests, see Finding Records (on page 74).
2. On the MDF Request Detail page, click the Edit button.
3. On the MDF Request Edit page, enter the amount in the Total Claim Amount Approved field.
4. Select Claim Approved from the Claim Status field. Then click Save.

   When you change the approval status to Approved, the following occurs:
   - Oracle CRM On Demand validates that the total claim amount approved does not exceed the approval limit set for the approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is generated.
   - The claim decision date is set to the current date on Oracle CRM On Demand.
   - A workflow rules sends the appropriate email notifications.

When the claim is approved, it debits the fund associated with the MDF request.

MDF Requests Fields

Use the MDF Request Edit page to add a market development fund (MDF) request or update the details for an existing MDF request. The MDF Request Edit page shows the complete set of fields for an MDF request.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key MDF Request Information	
ID	The MDF request identifier (ID).
Request Name	The unique name of the MDF request.
Principal Partner Account	The partner company, which is taking the lead in submitting the MDF request.
Fund	The name of the fund associated with the MDF request.
Submission Status	The status of the submission, such as Submitted, Not Submitted, or Recalled.

Field	Description
Due Date	The date by which you must have the MDF request approved. It is set to today's date plus 7 days by default.
Expiration Date	The date on which the MDF request is no longer valid.
Campaign	The name of the campaign with which the MDF request is associated.
Marketing Purpose	The marketing reason for the MDF request.
Region	The region for which the MDF request is being made.
Category	The category to which the MDF request belongs.
Partner Program	The name of the partner program with which the MDF request is associated.
MDF Request Currency	The requested currency for the MDF request.
MDF Request Detail Information	
Start Date	The date and time that the marketing activity starts.You can use the calendar controls to change this date.
End Date	The date and time that the marketing activity ends. You can use the calendar controls to change this date.
Amount Requested	The total requested amount for the marketing activity.
Amount PreApproved	The brand owner enters the total approved amount for the marketing activity.
Approval Status	The current approval status for the MDF request.
Request Date	The date and time that the MDF request was created.
Submitted Date	The date and time that the MDF request was submitted.
Pre-Approval Date	The date and time that the MDF request was preapproved.
Approver	The name of the current approver.
Last Approved By	The name of the previous approver.

Field	Description
Reason Code	The reason that the marketing activity was not approved. The default values are: Duplicate, Incorrect Information, Insufficient Information, and Other.
Claim Information	
Total Claim Amount Requested	The total claim amount that the partner is requesting for the marketing activity.
Total Claim Amount Approved	The total claim amount that is approved by the brand owner for the marketing activity.
Claim Status	The current status of the claim.
Claim Decision Date	The date on which a decision was made about the claim.
Additional Information	
Owner	The owner of the MDF request record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run in the Analytics pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the MDF request. This field has as a limit of 250 characters.
Owner Partner Account	The partner account for which the owner works. So, if the owner is a partner, then the owner account is populated with the name of the partner account to which the partner belongs.
Channel Manager	The channel manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel managers serve as the primary contact for the partner.
Originating Partner Account	The name of the partner who started the MDF request.

Special Pricing Requests

Special pricing requests include the set of business processes, by which a partner asks the brand owner for a discount on a product. For example, a special pricing request might be a response to a competitive deal or a downward trend in prices. The brand owner grants the lower prices and provides credits to the partner after the sale. The specially authorized price is typically valid for an authorized product, quantity, duration, and the partner or end customer or both.

Special pricing requests include the following two phases:

Special pricing request management. The partner, or the brand owner on behalf of the partner, creates a special pricing request for a product and provides details, such as the reason for the lower price. The partner submits the request to the brand owner for approval and when the request is approved, sells the inventory for a new lower price to the customer. After the sale, the partner can use the special pricing claim process to claim the difference between the original purchase cost and the new authorized cost.

Special pricing claim management. The partner creates a special pricing claim on approved and open special pricing requests to receive credit for a loss. Typically, Point-Of-Sale reports are submitted after the sale with special pricing claims. After the request is approved, the brand owner offers a credit to the partner for the difference between the original cost and the new authorized cost.

Special pricing requests benefit brand owners and partners in the following ways:

- Enable brand owners to support their partners in competitive situations
- Encourage partners to buy and stock products from brand owners, even if prices are likely to fall in the future

Working with the Special Pricing Request Homepage

The Special Pricing Request Homepage is the starting point for managing special pricing requests.

NOTE: Your company administrator can customize the layout of your Special Pricing Request Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Special Pricing Request

You can create a special pricing request by clicking the New button in the Recently Modified Special Pricing Request section. For more information, see Creating Records (on page 51) and Special Pricing Request Fields (on page 472).

Working with Special Pricing Request Lists

The Special Pricing Request Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for Special Pricing Requests.

Special Pricing Request List	Description
All Special Pricing Requests	This list displays all records to which you have visibility, regardless of who owns the list. It does not filter special pricing requests.
Recently Created Special Pricing Requests	Filters all special pricing requests, sorted by the created date.

Special Pricing Request List	Description
Recently Modified Special Pricing Requests	Filters all special pricing requests, sorted by the modified date.
My Special Pricing Requests	Filters special pricing requests with your name in the Owner field.
My Recently Created Special Pricing Requests	Filters special pricing requests with your name in the Owner field, sorted by the created date.
My Recently Modified Special Pricing Requests	Filters special pricing requests with your name in the Owner field, sorted by the modified date.
All Pending Special Pricing Requests	Filters all special pricing requests with the approval status of Pending Approval or the claim status of Claim Submitted.
My Pending Special Pricing Requests	Filters special pricing requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted.
My Approved Special Pricing Requests	Filters all approved special pricing requests that you own.
Special Pricing Requests Pending My Approval	Filters special pricing requests that have the approval status of Pending Approval or the claim status of Claim Submitted, and you are the next approver.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, therefore you cannot edit or delete them.

Viewing My Recently Modified Special Pricing Requests Section

The My Recently Modified Special Pricing Requests section shows the special pricing requests that you own and were recently modified. To expand the list, click Show Full List.

Viewing My Pending Special Pricing Requests Section

The My Pending Special Pricing Requests section shows all of the special pricing requests that you own with the approval status of Pending Approval or the claim status of Claim Submitted. To expand this list, click Show Full List.

Adding Sections to Your Special Pricing Request Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Special Pricing Requests Homepage:

- Special Pricing Request Lists
- All Pending Special Pricing Requests

- Recently Created Special Pricing Requests
- Recently Modified Special Pricing Requests
- My Pending Special Pricing Requests
- My Approved Special Pricing Requests
- My Recently Created Special Pricing Requests
- My Recently Modified Special Pricing Requests
- Special Pricing Requests Pending My Approval
- One or more report sections (Your company administrator can make report sections, such as the Special Pricing Request Analytics Report, available on your Special Pricing Requests Homepage.)

To add sections to your Special Pricing Requests Homepage

1. On the Special Pricing Requests Homepage, click Edit Layout.
2. On the Special Pricing Requests Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page. Then click Save.

Managing Special Pricing Requests

To manage special pricing requests, perform the following tasks:

- Linking Products to Special Pricing Requests (on page 463)
- Linking Programs to Special Pricing Requests (on page 464)
- Submitting Special Pricing Requests for Approval (on page 464)
- Recalling Special Pricing Requests (on page 465)
- Returning Special Pricing Requests (on page 466)
- Rejecting Special Pricing Requests (on page 466)
- Approving Special Pricing Requests (on page 467)
- Canceling Special Pricing Requests (on page 467)
- Submitting Claims for Special Pricing Requests (on page 468)
- Rejecting Claims for Special Pricing Requests (on page 468)
- Approving Claims for Special Pricing Requests (on page 468)

For additional procedures that are common to all records, see Working with Records (on page 46).

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Working with Attachments (on page 161)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Linking Products to Special Pricing Requests

You can link products to special pricing requests to do the following:

- Track which products belong to the special pricing request
- Calculate the total requested and preapproved (authorized) amounts

NOTE: You click the Update Request Totals button to calculate the total requested and preapproved amounts.

Before you begin. Your company administrator must have made the Special Pricing Products related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To link a product to a special pricing request

1. Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) to which you want to link a product.

   For information on selecting special pricing requests, see Finding Records (on page 74).
2. On the Special Pricing Request Detail page, scroll down to the Special Pricing Products section, and click Add.
3. In the Product field, select the product that you want to add to the special pricing request.
4. In the Special Pricing Product Detail page, update the required fields.

   For information on the fields, see Special Pricing Product Fields (on page 470).
5. Save the record.

To calculate the total requested and preapproved amounts

1. Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) for which you want to calculate the total requested and preapproved amounts.

   For information on selecting special pricing requests, see Finding Records (on page 74).
2. On the Special Pricing Request Detail page, scroll down to the Special Pricing Products section.
3. Click Update Request Totals in the Special Pricing Products section.

   This calculates the total requested and pre-approved amounts and updates the fields Total Amount Request and Total Amount Authorized on the special pricing request.

Linking Programs to Special Pricing Requests

You can associate a special pricing request with a specific partner program in which you participate.

To link programs to special pricing requests

1. Navigate to the Special Pricing Request Edit page.
2. In the Partner Program list, select the partner program that you want to add to the special pricing request, then click Save.

Submitting Special Pricing Requests for Approval

The partner, or the brand owner on behalf of the partner, creates a special pricing request for a price adjustment on a product and provides details, such as the reason for the lower price. The partner submits the special pricing request to the brand owner for approval. The request might or might not be granted by the brand owner. Most companies have well-defined processes to handle such requests for approval from partners. Typically, one or more employees of the brand owner evaluate the special pricing request on a variety of criteria and ultimately decide whether or not to approve the request.

Before you begin. The special pricing request must first be created. For more information on creating records, see Creating Records (on page 51). A workflow rule must be created that assigns an appropriate user as the approver for special pricing requests. For more information on creating workflow rules, see Creating Workflow Rules (on page 1511).

To submit special pricing requests for approval

1. Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) that you want to submit for approval.

   For information on selecting special pricing requests, see Finding Records (on page 74).
2. On the Special Pricing Request Detail page, click the Edit button.
3. On the Special Pricing Request Edit page, select Submitted from the Submission Status field.
4. Click Save.

   After the Submission Status field has been changed to Submitted and the record has been saved, the following occurs:
   - The approval status is set to Pending Approval.
   - The submitted date is automatically set to the current timestamp.
   - The routing of the special pricing request begins. A workflow rule sets the special pricing request's Approver field to the appropriate user.
   - The approver is added (if not already present) to the team of the special pricing request.
   - A workflow rule sends the required email notifications.

The special pricing request appears on the list of records that is waiting for the approver’s action and becomes read-only for the partner (owner). Further updates to the special pricing request (for example, adding or removing products, updating the requested prices, and so on) are not permitted. The partner can make changes to a submitted special pricing request only after recalling it successfully.

Recalling Special Pricing Requests

After a special pricing request has been submitted for approval and before it has been approved, you can recall the request. After you recall successfully the special pricing request, you can continue updating it and resubmit it for approval.

Before you begin. The special pricing request must have a submission status of Submitted and an approval status of Pending Approval.

To recall special pricing requests

1. Select the special pricing request (listed in the All Special Pricing Requests section on the Special Pricing Request homepage) that you want to recall.

   For information on selecting special pricing requests, see Finding Records (on page 74).
2. On the Special Pricing Request Detail page, click the Edit button.
3. On the Special Pricing Request Edit page, select Recalled from the Submission Status field.
4. Click Save.

   When you change the submission status to Recalled, the following occurs:
   - The approval status is reset as blank.
   - A workflow rule creates a new task to track the action.
   - A workflow rule sends the appropriate email notifications.

You can now update the special pricing request and resubmit it. For more information on submitting special pricing requests, see Submitting Special Pricing Requests for Approval (on page 464).

Returning Special Pricing Requests

As a special pricing request goes through the approval chain, an approver can return it to the owner to make changes. The approver can provide comments and request additional information from the owner.

Before you begin. The special pricing request must have a submission status of Submitted.

To return special pricing requests

1. Select the special pricing request that you want to return from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 74).
2. On the Special Pricing Request Detail page, click the Edit button.
3. On the Special Pricing Request Edit page, select Returned from the Approval Status field. Then click Save.

   When you change the approval status to Returned and click Save, the following occurs:
   - The submission status of the special pricing request is set to Not Submitted.
   - The date is removed from the Authorized Date field. However, the submitted date remains in the Submitted Date field.
   - A workflow rule creates a task record to track the return action of the approver.
   - A workflow rule sends the appropriate email notifications.

The owner of the special pricing request can update the special pricing request, and resubmit it. For more information on submitting special pricing requests, see Submitting Special Pricing Requests for Approval (on page 464).

Rejecting Special Pricing Requests

As a special pricing request goes through the approval chain, an approver can reject the special pricing request if the requested discounts cannot be granted.

Before you begin. The special pricing request must have a submission status of Submitted.

To reject special pricing requests

1. Select the special pricing request that you want to reject from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 74).
2. On the Special Pricing Request Detail page, click the Edit button.
3. On the Special Pricing Request Edit page, select Rejected from the Approval Status field.
4. Click Save.

   When you change the approval status to Rejected and click Save, the following occurs:
   - The submission status of the special pricing request remains in the Submitted state.
   - The date is removed from the Authorized Date field. However, the submitted date remains in the Submitted Date field.
   - A workflow rule creates a task record to track the return action of the approver.
   - A workflow rule sends the appropriate email notifications.

After the special pricing request has been rejected, it becomes read-only for the owner and further updates to it are not permitted.

Approving Special Pricing Requests

Depending on the business processes for your company, more than one person within your company might be required to approve a special pricing request. Currently, approval routing is a manual process and only one level of approval is supported. The current approver field must be manually modified to move the special pricing request along the approval chain.

Note: Each approver in the approval chain updates the Approver field, so that multilevel approval takes place.

Before you begin. The submission status of the special pricing request must be set to Submitted before you can approve it.

To approve special pricing requests

1. Select the special pricing request that you want to approve from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 74).
2. On the Special Pricing Request Detail page, click the Edit button.
3. On the Special Pricing Request Edit page, select Approved from the Approval Status field.
4. Click Save.

   When you change the approval status to Approved, the following occurs:

   - Oracle CRM On Demand validates that the submission status value is set to Submitted. If the submission status is any other value, the validation fails, and an appropriate error message is generated.
   - Oracle CRM On Demand validates that the total amount authorized does not exceed the approval limit set for the current approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is generated.
   - Oracle CRM On Demand validates that the Total Amount Authorized is equal to the sum of authorized amounts of all special pricing products. If it is not equal, validation fails and an appropriate error message is issued.
   - The Last Approved By field changes to the current user. The current Approver field is not updated.
   - The authorized date changes to the current date on Oracle CRM On Demand.
   - A workflow rule creates a new task to track the approval action.
   - A workflow rule sends the appropriate email notifications

After the special pricing request has been approved, it becomes read-only, and further updates to it are not permitted except when submitting a related claim or extending the expiration date.

Canceling Special Pricing Requests

The brand owner can cancel a special pricing request at any point, if the request is no longer valid.

Before you begin. The special pricing request must have an approval status of Approved.

To cancel a special pricing request

1. Select the special pricing request that you want to cancel from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 74).
2. On the Special Pricing Request Detail page, click the Edit button.
3. On the Special Pricing Request Edit page, select Cancelled from the Approval Status field. Then click Save.

   When you change the approval status to Cancelled, the following occurs:

   - Oracle CRM On Demand validates that the approval status value is Approved.

- A workflow rule creates a new task to track the action.
- A workflow rule sends the appropriate email notifications.

After the special pricing request has been cancelled, it becomes read-only and further updates to it are not permitted.

Submitting Claims for Special Pricing Requests

Partners use the special-pricing claim process to claim the difference between the original purchase cost and the new approved cost that is authorized on the special pricing request. Typically, one or more employees of the brand owner evaluate the claim using a variety of criteria and decide whether or not to approve the claim.

To submit claims for special pricing requests

1. Select the special pricing request for which you want to submit a claim from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 74).
2. On the Special Pricing Request Detail page, click the Edit button.
3. On the Special Pricing Request Edit page, enter an amount in the Total Claim Amount Req field.
4. Select Claim Submitted from the Claim Status field. Then click Save.

   After the Claim Status field has been changed to Submitted and the record has been saved the following occurs:
   - The routing of the special pricing request claim begins. A workflow rule sets the Approver field of the special pricing request to the appropriate user.
   - The approver is added to the team of the special pricing request, if not already present.
   - A workflow rule sends the appropriate email notifications.

Rejecting Claims for Special Pricing Requests

As a special pricing claim goes through the approval chain, an approver can reject it.

Before you begin. The special pricing request claim must have a claim status of Submitted.

To reject a claim for a special pricing request

1. Select the special pricing request for which you want to reject a claim from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 74).
2. On the Special Pricing Request Detail page, click the Edit button.
3. On the Special Pricing Request Edit page, select Claim Denied from the Claim Status field.
4. Click Save.

   When you change the claim status to Claim Denied and click Save, the following occurs: a workflow rule sends the appropriate email notifications.

Approving Claims for Special Pricing Requests

An approver can approve a special pricing claim and offer a credit to the partner. Only one level of approval is currently supported for special pricing claims.

Before you begin. The claim status of the special pricing claim must be set to Claim Submitted before you can approve it.

To approve claims for special pricing requests

1 Select the special pricing request for which you want to approve a claim from the All Special Pricing Requests section on the Special Pricing Request homepage.

   For information on selecting special pricing requests, see Finding Records (on page 74).

2 On the Special Pricing Request Detail page, click the Edit button.
3 On the Special Pricing Request Edit page, enter an amount in the Total Claim Amount Approved field.
4 Select Claim Approved from the Claim Status field. Then click Save.

   When you change the claim status to Claim Approved, the following occurs:

   - Oracle CRM On Demand validates that the total claim amount approved does not exceed the approval limit set for the approver and that the approval does not result in a negative fund balance. If the validation fails, an appropriate error message is issued.
   - The claim decision date changes to the current date on Oracle CRM On Demand.
   - A workflow rule sends the appropriate email notifications.

Managing Special Pricing Products as Related Items

To manage special pricing products as related items, perform the following tasks :

- Creating Special Pricing Products as Related Items (on page 469)
- Special Pricing Product Fields (on page 470)

For additional procedures that are common to all records, see Working with Records (on page 46).

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Creating Special Pricing Products as Related Items

You can create a special pricing product as a related item of a special pricing request in order to indicate the requested cost (or other information) for a specific product. From Oracle CRM On Demand, you create a special pricing product as a related item by entering information in a form. You can access this form from the special pricing request details page.

NOTE: Before you can create special pricing products, the Special Pricing Products area must be added to the Special Pricing Request details page as a related item. For more information on adding related items, see Customizing Related Item Layouts (on page 1258).

To create special pricing products as a related items

1 On the Special Pricing Request Detail page, scroll down to the Special Pricing Products section, and click Add.
2 In the Product Name field, select a product.

3 Update the rest of the fields on the Special Pricing Request Product Edit page, as needed. Then click Save.
For information on each field, see Special Pricing Product Fields (on page 470).

Special Pricing Product Fields

Use the Special Pricing Product Edit page to create a new special pricing product. The Special Pricing Product Edit page shows the complete set of available fields for a special pricing product.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. Therefore, the information you see on the screen might differ from the information in this table.

The following table provides additional information regarding the fields on the Special Pricing Product Edit pages.

Field	Description
Key Product Information	
Product	The name of the product for the special price request. If the special pricing request is related to an opportunity, then only the products that exist for that opportunity can be selected. If not, then all products are listed.
Product: Product Category	The category of the product carried over with the product definition. Read-only.
Quantity	The expected quantity of products that will be sold under this special pricing request.
Currency	The currency for the special pricing product.
Product: Part #	The part number carried over with the product definition. This field is read-only.
Product: Type	The type of product carried over with the product definition. This field is read-only.
Product: Status	The status carried over with the product definition. This field is read-only.
MSRP	The manufacturer's suggested retail price (MSRP) in the currency used. This field is read-only for the partner. If an end customer has been defined for the special pricing request and a price list has been associated with that end customer, then Oracle CRM On Demand populates the MSRP field upon Special Pricing Product record save, based on this price list. The price list of the special pricing request is automatically populated with the price list value added to the account or end customer record that is associated with the Special Pricing Request record. The following conditions should also be met: - The Price List associated with the End Customer is of type 'MSRP' - The status of this Price List is ‘Published’ - The Product exists on this Price List

Field	Description
	- The Start Date of the Special Pricing Request falls between the Effective From/To dates of the Price List (and the Price List Line Item) If a price list has not been associated with the end customer, then the price list on the Special Pricing Request header will remain empty.
Special Pricing Request Detail Information	
Purchase Cost	The price that the partner originally paid for the product. Oracle CRM On Demand populates this field upon the Special Pricing Product record save from the price list associated with the owner partner account. For purchase cost to be populated in the Special Pricing Product record, the owner of the Special Pricing Request should be a Partner User. The following conditions should also be met: - The Price List associated with the Owner Partner Account is of type 'DIST COST' - The status of this Price List is ‘Published’ - The Product exists on this Price List - The Start Date of the Special Pricing Request falls between the Effective From/To dates of the Price List (and the Price List Line Item) You can edit the Purchase Cost field and change the default value.
Requested Cost	The reduced price that the partner requested for the special pricing request.
Requested Resale Cost	The resale price at which the partner wants to sell the product.
Authorized Cost	The partner's price that was negotiated for the special pricing request. This field is read-only for the partner.
Suggested Resale Price	The resale price suggested by the brand owner. This field is read-only for the partner.
Requested Amount	Calculates the discount requested. Oracle CRM On Demand calculates the amount.
Requested Discount Percent	Calculates the discount percentage requested. Oracle CRM On Demand calculates the discount percentage.
Authorized Amount	Calculates the discount authorized. Oracle CRM On Demand calculates the discount authorized.
Authorized Discount Percent	Calculates the discount percentage authorized. Oracle CRM On Demand calculates the discount percentage authorized.
Special Pricing Justification	
Competitor Name	The name of the competitor for the special pricing request.

Field	Description
Competitor Product	The name of the competitor's product.
Competitor Product Price	The price of the competitor's product.
Competitor Partner	The name of the competing partner.
Other Competitive Information	Any other information regarding competitive product offerings, special price justification, and so on.
Additional Information	
Description	Additional information about this list item. This field has a limit of 16,350 characters.

Special Pricing Request Fields

Use the Special Pricing Request Edit page to add a special pricing request or update details for an existing special pricing request. The Special Pricing Request Edit page shows the complete set of fields for a special pricing request.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in lists. So, the information you see might differ from the standard information, described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Special Pricing Request Information	
ID	The special pricing request identifier (ID).
Request Name	The name of the special pricing request.
Principal Partner Account	The partner company that is leading the effort on the special pricing request.
Submission Status	The status of the submission, such as Not Submitted, Submitted, Recalled.
Due Date	The date by which you must have the special pricing request approved. This field displays the date as one week from the current day by default.
Fund	The name of the fund associated with the special pricing request.
Opportunity	The opportunity to which the special pricing request is related.
End Customer	The end customer for the special pricing request. If the request is associated with an opportunity, then you can only select Opportunity Account.

Field	Description
Originating Partner Account	The partner who originated the special pricing request.
Deal Registration	The deal registration for which the request is related.
Partner Program	The partner program with which the special pricing request is associated.
Currency	The currency to which the price is converted. You can select another currency to convert the price to another currency, if your company administrator sets up that feature.
Special Pricing Request Detail Information	
Start Date	The date and time from when the special pricing starts. You can use the calendar controls to change this date.
End Date	The date and time after which the special pricing is no longer effective. You can use the calendar controls to change this date.
Total Amount Requested	Oracle CRM On Demand generates the total for the requested amount of each special pricing product.
Total Amount Authorized	Oracle CRM On Demand generates the total for the authorized amount of each special pricing product.
Request Date	The date and time when the special pricing request was created.
Submitted Date	The date and time that the special pricing request was submitted.
Authorized Date	The date and time that the special pricing request was approved.
Approver	The name of the current approver.
Approval Status	The current approval status of the special pricing request, such as Pending Approval, Approved, Returned, Rejected, Expired, or Cancelled.
Last Approved By	The name of the person who most recently approved the special pricing request.
Reason Code	Indicates the reason why a special pricing request was returned or rejected.
Claim Information	
Total Claim Amount Req.	The total claim amount that is being requested by the partner.

Field	Description
Total Claim Amount Approved	The total claim amount that is being approved by the brand owner.
Claim Status	The current status of the claim, such as In Progress, Claim Submitted, Claim Denied, and Claim Approved.
Claim Decision Date	The date on which a decision was made for the claim.
Additional Information	
Owner	The owner of the special pricing request record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run in the Analytics pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Modified	The name of the person who creates or updates the record followed by the date and time it was created or updated. Oracle CRM On Demand generates this value.
Description	Additional information about the special pricing request. This field has as a limit of 250 characters.
Owner Partner Account	The partner account for which the owner works. So, if the owner is a partner, then the owner account is populated with the name of the partner account to which the partner belongs.
Channel Manager	The channel manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel managers serve as the primary contact for the partner.

Funds

Use the Funds pages to create, update, and track funds.

A *fund* is typically a sum of money or a set of other resources that are set aside for a specific purpose. Funds can be market development funds, cooperative funds, trade promotion funds, and so on. From the Funds pages, you can manage a set of activities that require preapproval and process claims for marketing funds.

When you create a fund record, you become the owner of the fund or the fund manager. Typically, fund owners can update or delete fund records, add other users as fund participants, create credit and debit entries, and add attachments and notes to a fund. However, your company administrator can adjust your access levels to restrict or expand your access to fund records.

Fund participants can view the fund record, but they cannot edit it. They can also submit preapproval requests and claim requests against the funds in which they are listed as participants. Fund managers can view and edit all fund requests against the funds that they own and can approve or reject these fund requests.

NOTE: You cannot edit fund requests in which the Status field is set to Claim Approved.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include working with funds, the Funds tab might be excluded from your setup.

Working with the Funds Homepage

The Funds Homepage is the starting point for managing funds and fund requests.

NOTE: Your company administrator can customize the layout of your Funds Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Fund or a Fund Request

You can create a fund or a fund request by either clicking Fund or Fund Request in the Create section at the left of the Fund Homepage. For more information, see Creating Records (on page 51) and Fund Fields (on page 483).

Working with Fund Lists or Fund Request Lists

The Fund Lists and Fund Request List sections show a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard fund lists that are available by default.

Fund List	Filters
All Funds	All the funds that you and your subordinates own
All Active Funds	All the funds that you and your subordinates own with a Status of Active
My Funds	Funds with your name in the Owner field
My Active Funds	Funds with your name in the Owner field and with a Status of Active

The following table describes the standard fund request lists that are available by default.

Fund Request List	Filters
All Fund Requests	All the fund requests that you and your subordinates own
My Fund Requests	Fund requests with your name in the Owner field
My Pending Fund Requests	All fund requests that you own with the status of Pre-Approval Submitted.

Fund Request List	Filters
Pending Fund Requests	All fund requests with the status of Pre-Approval Submitted.
My Approved Fund Requests	All fund requests that you own with the status of Pre-Approved.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Your Pending Fund Requests

To view your pending fund requests, look in the My Pending Fund Requests section, which shows the following information: Fund Request Name, Fund, Pre-Approved Req, Granted, Approved, Request Date, Due Date, and Status.

Your pending fund requests are the requests with the status of Pre-Approval Submitted.

To expand the list of recently modified funds, click Show Full List.

Viewing Open Activities for Fund Requests

To view the open activities for fund requests, look in the Fund Request - Open Activities section, which shows the following information: Due Date, Priority, Activity, Subject, and Fund Request.

This information provides the list of the open activities that are linked to your fund requests. The Priority field shows the priority for tasks that you or your manager specified, such as 1-High, 2-Medium, or 3-Low. The task priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, a down arrow for low priority.

NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values (on page 1254).

To expand the list of recently modified fund requests, click Show Full List.

Adding Sections to Your Funds Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Funds Homepage:

- Pending Fund Requests
- One or more report sections (your company administrator can make report sections available on your Funds Homepage)

To add sections to your Funds Homepage

1 On the Funds Homepage, click Edit Layout.
2 On the Funds Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3 Click Save.

Related Topics

See the following topics for related Fund information:

- Funds (on page 474)
- Managing Funds (on page 477)
- Fund Fields (on page 483)

Managing Funds

To manage funds, do the following tasks:

- Adding Fund Participants (on page 478)
- Adding Credits to Funds (on page 478)
- Processing Requests for Funds (on page 479)
- Processing Claims (on page 482)
- Applying Debits Against Funds (on page 482)
- Reviewing Fund Activity (on page 483)

NOTE: The funds feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: You can update a fund record if you are its owner. If you are a fund participant, then you can create and update fund requests.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Transferring Ownership of Records (on page 145)
- Adding Notes (on page 157)
- Attaching Files and URLs to Records (on page 163)
- Deleting and Restoring Records (on page 173)
- Viewing Audit Trails for Records (on page 175)
- Customizing the Audit Trail (on page 1306)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related Fund information and topics of interest:

- Working with the Funds Homepage (on page 475)
- Fund Fields (on page 483)

- Analytics (on page 789)
- Tracking Assets (on page 278)

Adding Fund Participants

When you create a fund record, you become the owner by default. Next you want to add fund participants. Adding someone as a fund participant allows that person to view the fund record and submit fund requests against the fund.

Before you begin. For users to appear on the list of eligible fund participants, they must first be set up as active users of Oracle CRM On Demand High Tech Edition.

To add a fund participant

1. Select the fund.

   For instructions on selecting funds, see Finding Records (on page 74).
2. On the Fund Detail page, scroll down to the Fund Participants section and click Add Participant.

   NOTE: You might have to add the Fund Participants section to your layout. For information on changing the layout, see Changing Your Detail Page Layout (on page 749).
3. On the Add Fund Participant page, click the Lookup icon, and select the user.

   The user list consists of all people using Oracle CRM On Demand High Tech Edition.
4. Save the record.

Adding Credits to Funds

To make funds available, add credit to the fund.

To add credit to a fund

1. Select the fund.

   For instructions on selecting funds, see Finding Records (on page 74).
2. On the Fund Detail page, scroll down to the Fund Credits section and click New in the title bar.

   NOTE: You might have to add the Fund Credits section to your layout. For information on changing the layout, see Changing Your Detail Page Layout (on page 749).
3. Enter the information as described in the following table, and then save the record.

Field	Description
Fund	The name of the fund, which is set to the current fund by default. (View-only.)
Credit Name	The name of this credit record. This field has a limit of 30 characters. (Required field.)
Amount	The amount of the credit that you are applying to the fund, for example, $500.
Description	The description of this fund credit.

Field	Description
Expiration Date	The date after which the credit will no longer be valid (MM/DD/YYYY). The date is provided for informational purposes. Use the Calendar icon to select the date.

Processing Requests for Funds

When you want to start using some of the fund amount, create a fund request and submit it to the fund manager for approval. To track the stage of the fund request, you and your fund manager update the Status field.

To submit a request for pre-approval

1. Select the fund.

   For instructions on selecting funds, see Finding Records (on page 74).
2. On the Fund Detail page, scroll down to the Fund Requests section and click New.

   NOTE: You might have to add the Fund Requests section to your layout. For more information, see Changing Your Detail Page Layout (on page 749).
3. On the Fund Request Edit page, enter the required information.

   The following table describes field information for fund requests. Your administrator can add, rename, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Key Fund Request Information	
Request ID*	The identifier for the fund request. Oracle CRM On Demand generates the Request ID. (Required field.)
Fund Request Name	The name of the Fund Request. Limit of 50 characters. (Required field.)
Type	Indicates the fund type. This is a customizable field, which your company administrator can alter. (Required field.) Two types of funds are provided: - **MDFs (market development funds).** These funds are used by the company's sales or marketing department to help a partner, reseller, or distributor to sell and market your products. - **SPFs (special pricing authorization).** These funds are used by a company to support special pricing requests. These special pricing requests are fund requests that a partner submits to obtain a special price on a product or group of products. This price is usually requested so the partner can stay competitive or make a specific margin.
Fund	The name of the linked Fund. (Required field.)

Field	Description
Status	The current status of the Fund Request. Required field. (Required field.) The following are the default options: Claim Approved, Claim Denied, Claim Submitted, In Progress, Pre-Approval Denied, Pre-Approval Submitted, or Pre-Approved. Fund participants can change the status to: In Progress, Pre-Approval Submitted, or Claim Submitted.
Due Date	The date by which you must have the fund request approved. (Required field.)
Opportunity	The opportunity to which the fund is related.
Opportunity Account	The account to which the related opportunity belongs.
Campaign	Use to link a campaign with a fund.
Marketing Purpose	Default options are Partner Incentive, Joint Marketing, Competitive Positioning, New Product Launch, or Customer Retention.
Region	Default options are Africa, Asia/Pacific, Europe, Latin America, Middle East, None, North America, Northern Europe, Other, South America, Southern Europe, or Worldwide.
Category	Default options are Advertising, Branding, Customer Event, Direct Mailing, Displays, Executive Event, Joint Advertising, Other, Promotion, Samples, Seminar, Spiff, Trade Show, or Training.
Partner Program	The partner program for which the fund request is being made.
Fund Request Detail Information	
Pre-Approval Req.	The amount of funds that you need to execute your tasks.
Granted	Used by the Fund Manager, this field contains the amount granted to the participant, based on the amount requested in the Pre-Approval Req. field.
Claim Req.	After the task is completed, the participant claims the amount spent to complete the task using this field.
Approved	Used by the Fund Manager, this field contains the amount approved based on the amount claimed.
Request Date	Defaults to today's date.
Pre-Approval Date	Used by the Fund Manager, this field contains the date on which the Fund Manager approved the fund request amount.

Field	Description
Claim Decision Date	Used by the Fund Manager, this field contains the date on which the Fund Manager approved the fund claim amount.
Begin Date	The beginning of the period for which the brand owner has approved the fund request.
End Date	The end of the period for which the brand owner has approved the fund request. After this date, the fund request is no longer valid.
Fund Request Currency	The currency in which the fund was requested.
Additional Information	
Owner	Generally, the owner can update the record, transfer the record to another owner, or delete the record. However, access levels can be adjusted to restrict or expand a user's access. This value affects which records are included in reports you or your managers run in the Analytics pages.
Modified	Name of the person who creates or updates the record, followed by the date and time when the record is created or updated. System-generated.
Owner Account	This is the partner account for which the owner works. So, if the owner is a partner, then the owner account is populated with the name of the partner account to which the partner belongs.
Channel Manager	The channel manager is responsible for maintaining the relationship between the partners and the brand owner company. Channel managers serve as the primary contact for the partner.
Description	This field has as a limit of 250 characters.

1. For Status, select Pre-Approval Submitted.
2. Save the record.

   The fund request record appears in the Pending Fund Requests section on the fund manager's Funds Homepage.

To pre-approve a fund request

1. On the Funds Homepage, select the fund request from the Pending Fund Requests section.
2. On the Fund Request Detail page, click the Edit button.
3. On the Fund Request Edit page, do the following:
   a. Enter the appropriate date in the Pre-Approval Date field.
   b. Enter the amount you approve in the Granted field.
   c. Update the Status field to Pre-Approved.
4. Save the record.

Processing Claims

Once the Fund Manager approves the fund request and you complete the task for which you requested the fund, you are ready to submit a claim. After you submit the claim, the Fund Manager can review and approve it.

To submit a claim

1. Select a fund request from a Fund Request List for which you want to submit a claim or select a preapproved fund request (listed in the Pending Fund Request section on the Funds homepage).

   For instructions on selecting fund requests, see Finding Records (on page 74).
2. On the Fund Request Detail page, click the Edit button.
3. On the Fund Request Edit page, do the following:
   a. Enter the amount you are claiming in the Claim Req. field.
   b. Select Claim Submitted from the Status field.
   c. Enter an appropriate date in the Due Date field.
4. Save the record.

To approve a claim

1. Select the fund request (listed in the Pending Fund Request section on the Funds homepage) for which you want to approve a claim.

   For instructions on selecting fund requests, see Finding Records (on page 74).
2. On the Fund Request Detail page, review the amount being claimed in the Claim Req. field, and then click the Edit button.
3. On the Fund Request Edit page, do the following:
   a. Enter the amount you approve in the Approved field.
   b. Enter the date in the Claim Decision Date field.
   c. Select Claim Approved from the Status field.

   NOTE: To approve funds, you must have the Fund Approval Limit set to a sufficient value on your user record. Contact your company administrator if the approval limit is insufficient. In addition, Oracle CRM On Demand does not allow you to approve a fund request that results in a negative fund balance unless the Allow Negative Balance check box is selected on the Fund Detail page.
4. Save the record.

   After a claim is approved, it appears in the Fund Debits section of the fund record.

   NOTE: After a claim is approved, you can no longer edit the fund request.

Applying Debits Against Funds

To deduct an amount from the fund, create a debit record.

To apply a debit against a fund

1. Select the fund.

   For instructions on selecting funds, see Finding Records (on page 74).
2. On the Fund Detail page, scroll down to the Fund Debits section and click New in the title bar to create a debit entry.
3. On the Fund Debit Edit page, enter the required information.

   The Fund Request Name has a limit of 50 characters.

Reviewing Fund Activity

You can review the fund activity for records that you manage, or if you are the fund administrator at your company, for all your company's funds and fund requests. This allows you to monitor and track fund activity.

To review a fund's activity

1. Select the fund.

   For instructions on selecting funds, see Finding Records (on page 74).
2. On the Fund Detail page, scroll down to the Audit Trail section.

   The list traces each activity concerning the fund, including transactions, dates, and people involved.

   NOTE: You might want to add the Audit Trail section to your layout. For more information, see Changing Your Detail Page Layout (on page 749).

Fund Fields

Use the Fund Edit page to add a fund or update details for an existing fund. The Fund Edit page shows the complete set of fields for a fund record.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Fund Information	
Fund ID	The fund identifier. System-generated. (Required field.)
Fund Name	The name of the fund. Limit of 50 characters. (Required field.)
Start Date End Date	Time period that the fund is valid.
Status	Default options are Active, Closed, In Progress, or Suspended.
Type	Indicates the fund type. The options for the fund type are: ■ **MDF (Market Development Funds).** MDF are monetary funds given by a manufacturer's sales or marketing department to help a partner, reseller, or distributor to sell its products, or to market the manufacturer's brand. ■ **SPA (Special Pricing Authorization).** SPA allows partners to request a special price for a product or group of products that is being sold.
Partner	Accounts must have the Partner field checked for them to appear in this selection list.
Allow Negative Balance	Selecting this check box enables the fund to carry a negative balance. For example, if the fund's balance is $500, then a fund request of $600 can be approved. If this check box is not selected, Oracle CRM On Demand displays a

Field	Description
	message indicating that negative balances are not allowed if the fund approver tries to approve the same $600 fund request. (Required field.) This check box is selected by default.
Target Amount	The total dollar amount targeted for the fund. (Required field.)
Total Credits	Read-only field. The sum of all the fund credits that are created in the Fund Credits section.
Total Debits	Read-only field. This is the sum of all the fund debits that are created in the Fund Debits section. Once a Fund Claim is approved, a debit record is automatically created in the Fund Debit section.
Balance	Read-only field. Value is: (Total Credits - Total Debits).
Total Pre-Approved	Read-only field. The sum of all the Fund Requests approved for a given Fund. Once the Fund Manager approves a Fund Request, the value is reflected in this field.
Balance after Pre-Approvals	Read-only field. Value is: (Total Credits - Total Pre-Approved).
Fund Currency	The currency of the fund, for example, U.S. dollars or euro. Use the Currency selector icon to choose the currency of the fund.
Additional Information	
Owner	The owner of the fund record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run in the Analytics pages.
Description	Limit of 250 characters.

Related Information

See the following topics for related Fund information:

- Funds (on page 474)
- Working with the Funds Homepage (on page 475)
- Managing Funds (on page 477)

Courses

A *course* is a structured educational program offered with the primary aim of imparting a specific set of skills to an individual. Many companies, especially those that deal with complex products or services, require their partners and resellers to be adequately trained in and familiar with what they sell. Thus, courses become a mechanism to disseminate knowledge and information about a company's products and services. Typically, courses focus on a specific product or product family. However, sometimes they might also deal with generic concepts or principles. Courses can be either theoretical or practical (for example, hands-on training, laboratory based, and so on) or a blend of both.

In Oracle CRM On Demand, a course can be associated with a specific product or a set of products. Likewise, a course can also be associated with a single product category, several product categories, or none at all. With the standard configuration of Oracle CRM On Demand, you can also capture several basic attributes of a course, such as the duration, fee, start and end dates, dependencies on other courses, and so on.

Courses might be offered either by the company itself, outsourced to designated training service providers, or both. With Oracle CRM On Demand, you can define the list of third-party vendors offering the course and publish the list to partners. Once a course is published, partner employees can enroll contacts into the course.

Working with the Course Homepage

The Course Homepage is the starting point for managing courses.

NOTE: Your company administrator can customize the layout of your Course Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Course

You can create a course by clicking the New button in the Recently Modified Courses section. For more information on creating courses, see Creating Records (on page 51) and Course Fields (on page 489).

Working with Course Lists

The Course Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for courses.

Course List	Description
All Courses	Lists all courses to which you have visibility, regardless of the owner.
Recently Created Courses	All courses that were created in the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently created course appears first in the list.
Recently Modified Courses	All courses that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified course appears first in the list.
Recently Introduced Courses	All courses that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced course appears first in the list.
Retiring Courses	All courses that are scheduled to be retired within the next 90 days to which you have visibility. The default sort

Course List	Description
	order is chronological, so the course that is about to be retired first appears first in the list.
My Courses	All courses that are owned by you.
My Recently Created Courses	All courses created within the last 30 days that are owned by you.
My Recently Modified Courses	All courses updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Courses

The Recently Modified Courses section shows the courses that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Course Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Course Homepage:

- All Courses
- Recently Created Courses
- Recently Modified Courses
- Recently Introduced Courses
- Retiring Courses
- My Courses
- My Recently Created Courses
- My Recently Modified Courses

To add sections to your Course Homepage

1. On the Course Homepage, click Edit Layout.
2. On the Course Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
3. Click Save.

Managing Courses

To manage courses, do the following tasks:

- Associating Certifications with Products, Product Categories, and Solutions (on page 504)
- Associating Courses with Exams and Certifications (on page 487)

- Relating Courses to Other Courses (on page 488)
- Making Courses Visible to Partners (on page 488)
- Enrolling in Courses (on page 489)
- Updating the Course Enrollment Record (on page 489)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Adding Notes (on page 157)
- Working with Attachments (on page 161)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Courses with Products, Product Categories, and Solutions

You can associate courses with one or more products, product categories, and solutions. If the course is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the course is applicable to a solution, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Course Products, Course Product Categories, or Course Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate courses with products, product categories, or solutions

1. In the Course Products, Course Product Categories, or Course Solutions section of the Course Detail page, click Add.
2. On the edit page, specify the product (or, product category) and click Save.
3. Repeat the above steps as many times as necessary to define all the relationships.

NOTE: Follow the above steps to relate a course to solutions, regardless of whether the course is related to one solution or many solutions.

Associating Courses with Exams and Certifications

A course usually culminates in one or more exams. If you successfully pass the exam or series of exams, you are awarded a certificate. You can associate a course with exams, certifications, or both.

Before you begin.

Your company administrator must have made the Course Exams or Certification Courses related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate courses with exams and certifications

1. In the Course Exams or Certification Courses section of the Course Detail page, Click Add.
2. In the edit page, specify the exam or certification as appropriate.
3. Click Save.
4. Repeat the above steps to add additional exam or certificate relationships.

Relating Courses to Other Courses

In Oracle CRM On Demand you can relate a course to other courses. One course can be a prerequisite to one course, a follow-up to another course, and a replacement for another, possibly retired, course.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a holistic view of the available courses and their inter-dependencies. Oracle CRM On Demand will not enforce the relationship requirements specified in this section when a contact enrolls into a course. Thus, for example, a completed enrollment in course A might be defined as a pre-requisite for getting enrolled into course B; however, this pre-requisite will not be enforced by Oracle CRM On Demand and it will allow the contact to enroll into course B even though she may not have enrolled at all into course A.

NOTE: To ensure that a course cannot be related to itself, the Related Course field cannot be the same as the course on the parent page.

Before you begin.

Your company administrator must have made the Related Courses related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate a course to another course

1. On the Course List page, click the name of the course that you want to relate to another course.
2. In the Related Courses section of the Course Detail page, click Add.
3. On the Related Courses Edit page, select the related course and type of relationship. Then click Save.

Making Courses Visible to Partners

Courses are not automatically visible to partners. You can make the course visible by adding partner employees to a team, and associating that team with the course record.

Before you begin.

Your company administrator must have made the Course Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make courses visible to partners

1. In the Course Team section of the Course Details page, click Add Users.
2. On the Course Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the course to be visible.

   NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.

3. Click Save.

Enrolling in Courses

You can use Oracle CRM On Demand to enroll in a course to improve your skill set with a specific product or a set of products.

Before you begin.

Your company administrator must have made the Course Enrollments related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To enroll in a course

1. On the Course List page, click the name of the course in which you want to enroll.
2. In the Course Enrollments section of the Course Detail page, click Enroll.
3. On the Course Enrollment Edit page, select the course and the candidate you want to enroll. Then click Save.

NOTE: Subject to some constraints, Oracle CRM On Demand supports multiple enrollments by the same contact into the same course. A contact might want to enroll on the same course more than one time for several reasons, for example, to complete an incomplete enrollment, as a refresher, and so on. Oracle CRM On Demand allows a contact to enroll repeatedly into the same course as long as the enrollment dates or the owner of the record are different.

Updating the Course Enrollment Record

Only users with the appropriate access rights can update the course enrollment record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the enrollment record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Course Enrollments related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update a course enrollment record:

1. In the Course Enrollments section of the Course details page, click the Edit link for the enrollment record you want to modify.
2. Modify the fields as appropriate.
3. Click Save.

NOTE: The default permissible values for the enrollment status field are Enrolled, Completed, and Incomplete. However, this list is completely configurable and you can modify it to suit your business requirements.

Course Fields

Use the Course Edit page to add a course or update details for an existing course. The Course Edit page shows the complete set of fields for a course.

TIP: You can also edit courses on the Course List page and the Course Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the course. This field is case sensitive, make sure you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on, to avoid duplicate courses. This field is required.
Type	The course type that you want to use for this course.
Status	The status of the course, such as Planned or Available. Your administrator can modify the possible values for status, you may see a set of values different from those mentioned here. This field is required.
Available From	The date on which the course is introduced. This field is useful if you plan to introduce a course over the next few months but want to spread awareness about it to your partner community before the introduction. This field, if specified, decides whether or not this course will be displayed on the Recently Introduced Courses list on the course home page.
Course ID	Internal identifier for the course. Within a company, this identifier is typically unique; however, Oracle CRM On Demand does not enforce uniqueness.
Primary Product Product Category	The name of the primary product category on which this course focuses. Use this field only if the course is focused on a single product category. If the course is equally appropriate for several product categories, leave this field blank and use the Course Product Product Categories related item section instead. If your administrator enforces the relationship between products and their product category, then the primary product and the primary product category on the record must be associated with each other, and the behavior is as follows: - If a product is already selected in the Primary Product field, and if you select a product category that is not associated with the selected product, then you cannot save your changes. - If you select a product category before you select a product in the Primary Product field, then when you click the Lookup icon in the Primary Product field, a list of the products that are associated with the selected product category is displayed. Your administrator can enforce the relationship between products and their product category by selecting the Enforce Product Category-Product Relationship check box on the company profile.
Primary Product	The main product on which the course focuses. If the course is for more than one product, use the Course Products related-item to capture the list of products. Use this field only if the course is focused on a single product. If the course is equally appropriate for several products, leave this field blank and use the Course Products related item section instead.

Field	Description
Available Till	The date after which the course will no longer be offered. Use this field to spread awareness among the partner community that the course is set to be de-commissioned soon. This field, if specified, decides whether or not this course will be displayed on the Retiring Courses list on the course home page.
Course Details Section	
Duration (Hours)	The duration of the course.
Course Length (Days)	The calendar length of the course. Courses of longer duration (typically more than 8 hours) are usually offered over several days.
Format	Indicates the delivery format for the course.
Medium	Indicates the delivery medium for the course.
External Unique ID	The unique identifier of the course in an external system. This ID is required when you import data from an external system and must know whether an incoming course has been previously imported.
Website	The URL of a page that contains additional information about the course. The Website field is useful if the course information is stored and maintained in some application other than Oracle CRM On Demand.
Currency	The currency used for the fee.
Course Fee	The fee charged for taking the course.
Payment Options	The method by which you will pay for the course, such as credit card or check. This is a single-value field. Therefore, if multiple payment options are allowed, define them as a value in the drop-down list. For example, “Check or Credit”, “Cash or Credit”, and so on.
Contact Information Section	
Contact	The main point of contact for the course. Use this field only if the point of contact already exists as a contact in Oracle CRM On Demand.
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Company	The company of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.

Field	Description
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
First Name	The first name of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Company	The company of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Email	The email address of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point of contact for the course. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Additional Information	
Owner	The owner of the course record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the course. This field has a limit of 2,000 characters.

Course Enrollment Fields

Use the Course Enrollment page to enroll in a course. The Course Enrollment page shows the complete set of fields for a course enrollment.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Enrollment Information	
Course	The name of the course. This field is required.
Objective	The objective, if any, for enrolling in the course.
Enrollment Date	Defaults to current system date during creation. Modifiable during and after creation.

Field	Description
Enrollment Status	The current status of the course enrollment. As preconfigured, this value defaults to Enrolled during creation.
Candidate	The name of the candidate who will be attending the course. Must be a contact already defined in Oracle CRM On Demand. This field is required.
Enrollment Number	Enrollment numbers are usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Completion Date	The date on which the course was completed by the candidate.
Course Partner	The partner company with whom the candidate is enrolling for the specific course.
Additional Information	
Owner	The current owner of the course enrollment.
Description	Additional information about the course enrollment. This field has a limit of 2,000 characters.

Exams

An *exam* is a means of measuring the competency of an individual in a specific skill or set of skills. Exams are usually the next logical step for an individual after completing a course. Typically, a course culminates in an exam or series of exams. An individual is expected to register and appear for the exams upon completing the course. Many companies consider that a course has been successfully completed only if all of the culminating exams have been passed with a minimum passing score.

Just as with a course, an exam can also be associated with a product or group of products as well as a product category or several product categories. In Oracle CRM On Demand, you can define an exam as being for a specific product or a set of products or product categories. You can also associate an exam with one or more courses so that the logical progression from course to exam can be captured accurately.

Because exams are usually administered and managed by authorized testing service providers rather than by the company itself, Oracle CRM On Demand lets you define the list of such third-party vendors for a specific exam. You can use Oracle CRM On Demand to register any contact you have access to for an exam.

Working With the Exam Homepage

The Exam Homepage is the starting point for managing exams.

NOTE: Your company administrator can customize the layout of your Exam Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an Exam

You can create an exam by clicking the New button in the Recently Modified Exams section. For more information on creating exams, see Creating Records (on page 51) and Exam Fields (on page 498).

Working with Exam Lists

The Exam Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for exams.

Exam List	Description
All Exams	Lists all exams to which you have visibility, regardless of the owner.
Recently Created Exams	All exams that were created in the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently created exam appears first in the list.
Recently Modified Exams	All exams that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified exam appears first in the list.
Recently Introduced Exams	All exams that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced exam appears first in the list.
Retiring Exams	All exams that are scheduled to be retired within the next 90 days to which you have visibility. The default sort order is chronological, so the exam that is about to be retired first appears first in the list.
My Exams	All exams owned by you.
My Recently Created Exams	All exams created within the last 30 days that are owned by you.
My Recently Modified Exams	All exams updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Exams

The Recently Modified Exams section shows the exams that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Exam Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Exam Homepage:

- All Exams
- Recently Created Exams
- Recently Modified Exams
- Recently Introduced Exams
- Retiring Exams
- My Exams
- My Recently Created Exams
- My Recently Modified Exams

To add sections to your Exam Homepage

1. On the Exam Homepage, click Edit Layout.
2. On the Exam Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
3. Click Save.

Managing Exams

To manage exams, do the following tasks:

- Associating Exams with Products, Product Categories, and Solutions (on page 495)
- Associating Exams with Courses and Certifications (on page 496)
- Relating Exams to Other Exams (on page 496)
- Making Exams Visible to Partners (on page 497)
- Registering for Exams (on page 497)
- Updating the Exam Registration Record (on page 497)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Adding Notes (on page 157)
- Working with Attachments (on page 161)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Exams with Products, Product Categories, and Solutions

You can associate exams with one or more products, product categories, and solutions. If the exam is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the exam is applicable to a solution, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Exam Products, Exam Product Categories, or Exam Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate exams with products, product categories, or solutions

1. In the Exam Products, Exam Product Categories, or Exam Solutions section of the Exam Detail page, click Add.
2. On the edit page, specify the product or, product category, and click Save.
3. Repeat the above steps as many times as necessary to define all the relationships.

NOTE: Follow the above steps to relate an exam to solutions, whether the exam is related to one solution or many solutions.

Associating Exams with Courses and Certifications

An exam or series of exams usually indicates the successful completion of a course of certification. If you successfully pass the exam or series of exams, you pass the course or are awarded a certificate. You can associate an exam with courses, certifications, or both.

Before you begin.

Your company administrator must have made the Course Exams or Certification Exams related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate exams with courses and certifications

1. In the Course Exams or Certification Exams section of the Exam Detail page, Click Add.
2. In the edit page, specify the course or certification as appropriate.
3. Click Save.
4. Repeat the above steps to add additional course or certificate relationships.

Relating Exams to Other Exams

In Oracle CRM On Demand you can relate an exam to other exams. One exam can be a prerequisite to one exam, a follow-up to another exam, and a replacement for another, possibly retired, exam.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a holistic view of the available exams and their inter-dependencies. Oracle CRM On Demand does not enforce the relationship requirements specified in this section when a contact registers for an exam. Thus, for example, a successful completion or passing of exam A might be defined as a pre-requisite for registering into exam B; however, this pre-requisite will not be enforced by Oracle CRM On Demand and it will allow the contact to register for exam B even though she may have failed exam A or not even have registered for that exam.

NOTE: To ensure that an exam cannot be related to itself, the Related Exam field cannot be the same as the exam on the parent page.

Before you begin.

Your company administrator must have made the Related Exams related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate an exam to another exam

1. On the Exam List page, click the name of the exam that you want to relate to another exam.
2. In the Related Exams section of the Exam Detail page, click Add.
3. On the Related Exams Edit page, select the related exam and type of relationship.
4. Click Save.

Making Exams Visible to Partners

Exams are not automatically visible to partners. You can make the exam visible by adding partner employees to a team, and associating that team with the exam record.

Before you begin.

Your company administrator must have made the Exam Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make exams visible to partners

1. In the Exam Team section of the Exam Details page, click Add Users.
2. On the Exam Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the exam to be visible.

   NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.

3. Click Save.

Registering for Exams

You can use Oracle CRM On Demand to register for an exam to prove your competency in a specific product or a set of products.

Before you begin.

Your company administrator must have made the Exam Registrations related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To register for an exam

1. On the Exam List page, click the name of the exam for which you want to register.
2. In the Exam Registrations section of the Exam Detail page, click Register.
3. On the Exam Registration Edit page, select the exam and the candidate whom you want to register.
4. Click Save.

NOTE: Subject to some constraints, Oracle CRM On Demand supports multiple registrations by the same contact for the same exam. A contact might want to register for the same exam more than one time for several reasons, such as to improve upon a previous score or to pass a failed exam or even to renew an expired score. Oracle CRM On Demand allows a contact to register repeatedly for the same exam as long as the exam dates or the owner of the record are different.

Updating the Exam Registration Record

Only users with the appropriate access rights can update the exam registration record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the registration record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Exam Registrations related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update the exam registration record:

1. In the Exam Registration section of the Exam Details page, click the Edit link for the registration record you want to modify.
2. Modify the fields as appropriate.
3. Click Save.

NOTE: The default permissible values for the registration status field are Registered, Passed, and Failed. However, this list is completely configurable and you can modify it to suit your business requirements.

Exam Fields

Use the Exam Edit page to add a course or update details for an existing exam. The Exam Edit page shows the complete set of fields for an exam.

TIP: You can also edit courses on the Exam List page and the Exam Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the exam. This field is case sensitive, so be sure you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on, to avoid duplicate exams. This field is required.
Type	The exam type that you want to use for this exam.
Status	The status of the exam, such as Planned or Available. Your administrator can modify the possible values for status, you may see a set of values different from those mentioned here. This field is required.
Available From	The date on which the exam is introduced. This field is useful if you plan to introduce an exam over the next few months but want to spread awareness about it to your partner community before the introduction. This field, if specified, decides whether or not this exam will be displayed on the Recently Introduced Exams list on the exam home page.
Exam ID	Internal identifier for the exam. Within a company, this identifier is typically unique; however, Oracle CRM On Demand does not enforce uniqueness.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Primary Product Product Category</td><td>The name of the primary product category on which this exam focuses. Use this field only if the exam is focused on a single product category. If the exam is equally appropriate for several product categories, leave this field blank and use the Exam Product Product Categories related item section instead.

If your administrator enforces the relationship between products and their product category, then the primary product and the primary product category on the record must be associated with each other, and the behavior is as follows:

- If a product is already selected in the Primary Product field, and if you select a product category that is not associated with the selected product, then you cannot save your changes.
- If you select a product category before you select a product in the Primary Product field, then when you click the Lookup icon in the Primary Product field, a list of the products that are associated with the selected product category is displayed.

Your administrator can enforce the relationship between products and their product category by selecting the Enforce Product Category-Product Relationship check box on the company profile.</td></tr>
<tr><td>Primary Product</td><td>The main product on which the exam focuses. If the course is for more than one product, use the Exam Products related-item to capture the list of products. Use this field only if the exam is focused on a single product. If the exam is equally appropriate for several products, leave this field blank and use the Exam Products related item section instead.</td></tr>
<tr><td>Available Till</td><td>The date after which the exam will no longer be offered. Use this field to spread awareness among the partner community that the exam is set to be de-commissioned soon. This field, if specified, decides whether or not this exam will be displayed on the Retiring Exams list on the exam home page.</td></tr>
<tr><td colspan="2">Exam Details Section</td></tr>
<tr><td>Number of Questions</td><td>The total number of questions in the exam.</td></tr>
<tr><td>Time Allowed (Minutes)</td><td>The total time, in minutes, you are allowed when taking the exam.</td></tr>
<tr><td>Maximum Score</td><td>The maximum possible score that you can achieve in the exam.</td></tr>
<tr><td>Passing Score</td><td>The minimum score that you must obtain to pass the exam.</td></tr>
<tr><td>Validity (Months)</td><td>The length of time, in months, that the exam score is valid.</td></tr>
<tr><td>Website</td><td>The URL of a page that contains additional information about the exam. The Website field is useful if the exam information is stored and maintained in some application other than Oracle CRM On Demand.</td></tr>
<tr><td>Format</td><td>Indicates the delivery format for the exam.</td></tr>
</table>

Field	Description
Medium	Indicates the delivery medium for the exam.
Grading Method	The method by which the exam is graded.
Currency	The currency used for the fee.
Exam Fee	The fee charged for taking the exam.
Payment Options	The method by which you will pay for the exam, such as Credit Card, or Check. This is a single-value field. Therefore, if multiple payment options are allowed, define them as a value in the drop-down list. For example, “Check or Credit”, “Cash or Credit”, and so on.
Contact Information Section	
Contact	Select the main point of contact for the exam. Use this field only if the point of contact already exists as a contact in Oracle CRM On Demand.
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Company	The company of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated. The populated value is based on what you select in the Contact field.
First Name	The first name of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Company	The company of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Email	The email address of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point of contact for the exam. Use this field ONLY if the point of contact is not already defined in Oracle CRM On Demand.
Additional Information	

Field	Description
Owner	The owner of the exam record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the exam. This field has a limit of 2,000 characters.

Exam Registration Fields

Use the Exam Registration page to register for an exam. The Exam Registration page shows the complete set of fields for an exam registration.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Registration Information	
Exam	The name of the exam. This field is mandatory.
Objective	The objective, if any, for registering for the exam.
Registration Date	Defaults to current system date during creation. Modifiable during and after creation.
Registration Status	The current status of the exam registration.
Exam Partner	The partner company administering the specific exam for which the candidate is registering.
Score Expires On	The date on which the score or grade expires.
Candidate	The name of the candidate who will be taking the exam. Must be a contact already defined in Oracle CRM On Demand. This field is required.
Registration Number	Registration numbers are usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Completion Date	The date on which the exam was completed by the candidate.
Score Achieved	The numeric score (if any) achieved on the exam.
Grade Achieved	Letter grade (if any) achieved on the exam.

Field	Description
Exam Date	The date on which the exam is given.
Additional Information	
Owner	The current owner of the exam registration.
Description	Additional information about the exam registration. This field has a limit of 2,000 characters.

Certification

A *certification* is proof of an individual's competency in a specific set of skills. Whereas an exam measures a person's competency, a certification confirms that the person is competent. Certifications are typically awarded after a person has passed one or more exams. Therefore, certifications may be considered a logical progression of course and exams.

While not mandatory, certifications usually have an expiration date associated with them. That is, a person who holds a certificate can claim to be certified only for a defined period, after which she must re-apply for certification. When a certification has an expiration date, it is usually because the awarding company expects the skill or technology (for which the certificate was awarded) to evolve or become obsolete.

Unlike courses and exams, which might or might not be associated with products, a certification is almost always awarded for a specific product or set of products. Oracle CRM On Demand supports the association of a certificate with courses, exams, products, product categories, and solutions. None of these associations is mandatory; that is, you can associate as many or as few of these with a certification as appropriate. In some cases, you can even define a certification that is not associated with any course, exam, product, product category, or solution.

Working with the Certification Homepage

The Certification Homepage is the starting point for managing certifications.

NOTE: Your company administrator can customize the layout of your Certification Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Certification

You can create a certification by clicking the New button in the Recently Modified Certifications section. For more information on creating certifications, see Creating Records (on page 51) and Certification Fields (on page 507).

Working with Certification Lists

The Certification Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for certifications.

Certification List	Description
All Certifications	Lists all certifications to which you have visibility, regardless of the owner.

Certification List	Description
Recently Created Certifications	All certifications that were created in the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently created certification appears first in the list.
Recently Modified Certifications	All certifications that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified certification appears first in the list.
Recently Introduced Certifications	All certifications that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced certification appears first in the list.
Retiring Certifications	All certifications that are scheduled to be retired within the next 90 days to which you have visibility. The default sort order is chronological, so the certification that is about to be retired first appears first in the list.
My Certifications	All certifications owned by you.
My Recently Created Certifications	All certifications created within the last 30 days that are owned by you.
My Recently Modified Certifications	All certifications updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Certifications

The Recently Modified Certifications section shows the certifications that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Certification Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Certification Homepage:

- All Certifications
- Recently Created Certifications
- Recently Modified Certifications
- Recently Introduced Certifications
- Retiring Certifications

- My Certifications
- My Recently Created Certifications
- My Recently Modified Certifications

To add sections to your Certification Homepage

1. On the Certification Homepage, click Edit Layout.
2. On the Certification Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page. Then click Save.

Managing Certifications

To manage certifications, do the following tasks:

- Associating Certifications with Products, Product Categories, and Solutions (on page 504)
- Associating Certifications with Exams and Courses (on page 505)
- Relating Certifications to Other Certifications (on page 505)
- Making Certifications Visible to Partners (on page 506)
- Requesting Certification (on page 506)
- Updating the Certification Request Record (on page 506)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Adding Notes (on page 157)
- Working with Attachments (on page 161)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Certifications with Products, Product Categories, and Solutions

You can associate certifications with one or more products, product categories, and solutions. If the certification is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the certification is applicable to a solution or solutions, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Certification Products, Certification Product Categories, or Certification Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate certifications with products, product categories, or solutions

1. In the Certification Products, Certification Product Categories, or Certification Solutions section of the Certification Detail page, click Add.

2 On the edit page, specify the product, product category, or solution and click Save.
3 Repeat the above steps as many times as necessary to define all the relationships.

NOTE: Follow the above steps to relate a certification to solutions, regardless of whether the certification is related to one solution or many solutions.

Associating Certifications with Exams and Courses

A certification usually requires taking a course or series of courses. These courses culminate in one or more exams. If you successfully pass the exam or series of exams, you are awarded a certificate. You can associate a certification with exams, courses, or both.

Before you begin.

Your company administrator must have made the Certification Exams or Certification Courses related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate certifications with exams and courses

1 In the Certification Exams or Certification Courses section of the Certification Detail page, Click Add.
2 In the edit page, specify the exam or course as appropriate.
3 Click Save.
4 Repeat the above steps to add additional exam or course relationships.

Relating Certifications to Other Certifications

In Oracle CRM On Demand you can relate a certification to other certifications. One certification can be a prerequisite to one certification, a follow-up to another certification , and a replacement for another, possibly retired, certification.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a complete view of all the certifications available and their inter-dependencies. Oracle CRM On Demand does not enforce the relationship requirements specified in this section when granting a certification, for example, holding certification A might be defined as a prerequisite for being granted certification B; however, this prerequisite is not enforced by Oracle CRM On Demand and it allows certification B to be granted to a contact even if she does not hold certification A.

NOTE: To ensure that a certification cannot be related to itself, the Related Certification field cannot be the same as the certification on the parent record.

Before you begin.

Your company administrator must have made the Related Certifications related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate a certification to another certification

1 On the Certification List page, click the name of the certification that you want to relate to another certification.
2 In the Related Certifications section of the Certification Detail page, click Add.
3 On the Related Certification Edit page, select the related certification and type of relationship. Then click Save.

Making Certifications Visible to Partners

Certifications are not automatically visible to partners. You can make the certification visible by adding partner employees to a team, and associating that team with the certification record.

Before you begin.

Your company administrator must have made the Certification Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make certifications visible to partners

1. In the Certification Team section of the Certification Detail page, click Add Users.
2. On the Certification Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the certification to be visible.

   NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.

3. Click Save.

Requesting Certification

You can use Oracle CRM On Demand to request certification for a specific product or set of products.

Before you begin.

Your company administrator must have made the Certification Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To request certification

1. On the Certification List page, click the name of the certification that you want to request.
2. In the Certification Requests section of the Certification Detail page, click Request Certification.
3. On the Certification Request Edit page, select the certification and candidate for certification. Then click Save.

NOTE: Multiple certification requests for the same contact are supported. This is because contacts may have a need to request the same certification more than once, because either the existing certification has expired or a previous request was declined. Oracle CRM On Demand therefore enables multiple requests to be made for the same certification for the same contact as long as the request dates are different.

Updating the Certification Request Record

Only users with the appropriate access rights can update the certification request record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the request record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Certification Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update a certification request record

1 In the Certification Requests section of the Certification Detail page, click the Edit link for the request record you want to modify.
2 Modify the fields as appropriate.
3 Click Save.

NOTE: The default permissible values for the Certification Status field are Requested, Granted, and Denied. However, this list is completely configurable and your company administrator can modify it to suit your business requirements.

Certification Fields

Use the Certification Edit page to add a certification or update the details for an existing certification. The Certification Edit page shows the complete set of fields for a certification.

TIP: You can also edit certifications on the Certification List page and the Certification Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the certification. This field is case-sensitive, be sure you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on, to prevent duplicate certifications. This is a required field.
Type	The certification type you want to use for this certification.
Status	The status of the certification, such as Planned or Available. Your administrator can modify the possible values for status, so you may see a set of values different from those mentioned here. This is a required field.
Available From	The date after which the certification is available to be requested. This field, if specified, determines whether or not this certification is displayed on the Recently Introduced Certifications list on the certification home page.
Certification ID	An internal identifier for the certification. Typically unique, but Oracle CRM On Demand does not enforce uniqueness.
Primary Product Product Category	The name of the primary product category that the contact will be certified for upon successfully achieving the certification. Use this field only if the certification is focused on a single product category. If the certification is equally appropriate for several product categories, leave this field blank and use the Certification Product Product Categories related item section instead. If your administrator enforces the relationship between products and their product category, then the primary product and the primary product category on the record must be associated with each other, and the behavior is as follows:

Field	Description
	■ If a product is already selected in the Primary Product field, and if you select a product category that is not associated with the selected product, then you cannot save your changes. ■ If you select a product category before you select a product in the Primary Product field, then when you click the Lookup icon in the Primary Product field, a list of the products that are associated with the selected product category is displayed. Your administrator can enforce the relationship between products and their product category by selecting the Enforce Product Category-Product Relationship check box on the company profile.
Primary Product	The name of the primary product that the partner company will be certified for upon successfully achieving the certification. Use this field only if the certification is focused on a single product. If the certification is equally appropriate for several products, leave this field blank and use the Certification Products related item section instead.
Available Till	The date after which the certification will no longer be offered. This field, if specified, decides whether or not this certification is displayed on the Retiring Certifications list on the Certification homepage.
Certification Details Section	
Validity (Months)	The length of time, in months, that the certification is valid after it has been awarded to a contact. This field is for informational purposes only; Oracle CRM On Demand does not automatically set the validity period of an awarded certification.
Renewable	Indicates whether or not you can renew the certification awarded to a contact.
Website	The URL to a page that contains additional information about the certification. The Web site field is useful if the certification information is stored and maintained in some application other than Oracle CRM On Demand.
Currency	The currency used for the fee.
Certification Fee	The fee charged for awarding the certification.
Payment Options	The methods by which you will pay for the certification, such as credit card or check. This is a single-value field, but multiple payment options may be allowed, for example, “Check or Credit”, “Cash or Credit”, and so on.
Contact Information Section	
Contact	The contact for the certification.
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.

Field	Description
Contact: Account	The account name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
First Name	The first name of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Company	The company of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Email	The email address of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point-of-contact for the certification. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Additional Information	
Owner	The owner of the certification record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the certification record. This field has a limit of 2,000 characters.

Certification Request Fields

Use the Certification Request page to request a certification. The Certification Request page shows the complete set of fields for a certification request.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Request Information	
Certification	The name of the certification being requested. This field is required.

Field	Description
Objective	The objective, if any, for requesting the certification.
Request Date	The date of the requested certification. Defaults to the current system date during creation, but is modifiable during and after creation.
Certification Number	The certification numbers, which is usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Renewable	Indicates whether or not the granted certification is renewable.
Candidate	The name of the candidate requesting certification. Must be a contact already defined in Oracle CRM On Demand. This field is required.
Certification Date	The date on which the certification was awarded to the candidate.
Certification Status	The current status of the certification request.
Expiration Date	The date on which the awarded certification expires.
Additional Information	
Owner	The current owner of the certification request record.
Description	Additional information about the certification request record. This field has a limit of 2,000 characters.

Accreditation

An *accreditation* is proof of a partner company's ability or competence to sell something or provide an acceptable quality of service. While certifications are awarded to an individual, accreditations are awarded to a partner company. A partner company is awarded an accreditation after satisfying several requirements: usually, one of the requirements is to have a pre-defined minimum number of employees with specific certifications on its payroll. Thus, in some ways, an accreditation is a collection of certifications and is the next step in the logical progression of course to exams to certifications.

Accreditations can be associated with products, product categories and solutions. They can also be related to other accreditations.

Working with the Accreditation Homepage

The Accreditation Homepage is the starting point for managing accreditations.

NOTE: Your company administrator can customize the layout of your Accreditation Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an Accreditation

You can request an accreditation by clicking the New button in the Recently Modified Accreditations section. For more information on creating accreditations, see Creating Records (on page 51) and Accreditation Fields (on page 515).

Working with Accreditation Lists

The Accreditation Lists section displays a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for accreditations.

Accreditation List	Description
All Accreditations	Lists all accreditations to which you have visibility, regardless of the owner.
Recently Created Accreditations	All accreditations that were created in the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently created accreditation appears first in the list.
Recently Modified Accreditations	All accreditations that have been modified within the last 30 days to which you have visibility. The default sort order is reverse chronological, so that the most recently modified accreditation appears first in the list.
Recently Introduced Accreditations	All accreditations that became available within the last 90 days to which you have visibility. The default sort order is reverse chronological, so that the most recently introduced accreditation appears first in the list.
Retiring Accreditations	All accreditations that are scheduled to be retired within the next 90 days to which you have visibility. The default sort order is chronological, so the accreditation that is about to be retired first appears first in the list.
My Accreditations	All accreditations owned by you.
My Recently Created Accreditations	All accreditations created within the last 30 days that are owned by you.
My Recently Modified Accreditations	All accreditations updated within the last 30 days that are owned by you.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Accreditations

The Recently Modified Accreditations section shows the accreditations that were modified most recently.

To expand the list, click the Show Full List link.

Adding Sections to Your Accreditation Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Accreditation Homepage:

- All Accreditations
- Recently Created Accreditations
- Recently Modified Accreditations
- Recently Introduced Accreditations
- Retiring Accreditations
- My Accreditations
- My Recently Created Accreditations
- My Recently Modified Accreditations

To add sections to your Accreditation Homepage

1. On the Accreditation Homepage, click Edit Layout.
2. On the Accreditation Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page.
3. Click Save.

Managing Accreditations

To manage accreditations, do the following tasks:

- Associating Accreditations with Products, Product Categories, and Solutions (on page 513)
- Relating Accreditations to Other Accreditations (on page 513)
- Recording Certification Requirements for an Accreditation (on page 514)
- Making Accreditations Visible to Partners (on page 514)
- Requesting Accreditation (on page 514)
- Updating the Accreditation Request Record (on page 515)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Adding Notes (on page 157)
- Working with Attachments (on page 161)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Associating Accreditations with Products, Product Categories, and Solutions

You can associate accreditations with one or more products, product categories, and solutions. If the accreditation is appropriate for only one product or only one product category, then select the appropriate value from the Primary Product or Primary Product Category field, respectively. However, if the accreditation is applicable to a solution or solutions, more than one product, or more than one product category, follow the steps listed below.

Before you begin.

Your company administrator must have made the Accreditation Products, Accreditation Product Categories, or Accreditation Solutions related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To associate accreditations with products, product categories, or solutions

1 In the accreditation Products, Accreditation Product Categories, or Accreditation Solutions section of the Accreditation Detail page, click Add.
2 On the edit page, specify the product, product category, or solution and click Save.
3 Repeat the above steps as many times as necessary to define all the relationships.

NOTE: Follow the above steps to relate an accreditation to solutions, regardless of whether the accreditation is related to one solution or many solutions.

Relating Accreditations to Other Accreditations

In Oracle CRM On Demand you can relate an accreditation to other accreditations. One accreditation can be a prerequisite to one accreditation, a follow-up to another, and a replacement for another, perhaps, retired accreditation.

This information is captured only for informational purposes and is mainly intended to help you present your partners with a complete view of all the accreditations and their inter-dependencies. Oracle CRM On Demand does not enforce the relationship requirements specified in this section when granting an accreditation. Thus, for example, holding accreditation A might be defined as a prerequisite for being granted accreditation B; however, this prerequisite is not enforced by Oracle CRM On Demand and allows accreditation B to be granted to a partner company even if it does not hold accreditation A.

NOTE: To ensure that an accreditation cannot be related to itself, the Related Accreditation field cannot be the same as the accreditation on the parent record.

Before you begin.

Your company administrator must have made the Related Accreditations related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To relate an accreditation to another accreditation

1 On the Accreditation List page, click the name of the accreditation that you want to relate to another accreditation.
2 In the Related Accreditations section of the Accreditation Detail page, click Add.
3 On the Related Accreditation Edit page, select the related accreditation and type of relationship, then click Save.

Recording Certification Requirements for an Accreditation

An *accreditation* is proof of a partner company's ability or competence to deliver a product or service. You can use Oracle CRM On Demand to set the certification requirements for an accreditation. For example, you might require that for a partner company to be granted this accreditation, it must have 10% of their employees with the appropriate certification, and the minimum number of employees with the certification must be two. In other words, if there are 40 technical employees on the company's payroll, the company must have at least four employees with the appropriate certification. If there are only 15 employees on the company's payroll, the company still must have two employees with the appropriate certification.

Oracle CRM On Demand does not enforce the certification requirements specified in this section when granting an accreditation. This information is captured only for informational purposes and is mainly intended to educate your partners about the accreditation requirements.

Before you begin.

Your company administrator must have made the Accreditation Certification related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To record certification requirements for an accreditation

1. On the Accreditation List page, click the name of the accreditation for which you want to record certification requirements.
2. In the Accreditation Certifications section of the Accreditation Detail page, click Add.
3. From the Certification picklist, select the appropriate certification.
4. In the Number (#) of Certifications field, type a number if you want to define as a minimum number of employees required to possess this certification.
5. In the Percentage (%) of Employees Certified field, type a percentage if you want to define as a minimum percentage of employees that is required to possess this certification. Then click Save.

Making Accreditations Visible to Partners

Accreditations are not automatically visible to partners. You can make the accreditation visible by adding partner employees to a team, and associating that team with the accreditation record.

Before you begin.

Your company administrator must have made the Accreditation Team related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To make accreditations visible to partners

1. In the Accreditation Team section of the Accreditation Detail page, click Add Users.
2. On the Accreditation Team Edit page, specify the user name, team role and record access for each partner employee to whom you want the accreditation to be visible.

   NOTE: Oracle recommends that you grant Read-only access to the partner employee team members.

3. Click Save.

Requesting Accreditation

If you believe your company has met the requirements for accreditation, you can request accreditation from the partner company.

Before you begin.

Your company administrator must have made the Accreditation Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To request accreditation

1. On the Accreditation List page, click the name of the accreditation that you want to request.
2. In the Accreditation Request section of the Accreditation Detail page, click Request Accreditation.
3. On the Accreditation Request Edit page, select the accreditation and partner, then click Save.

NOTE: Partner companies may have a need to request the same accreditation more than once, because either the existing accreditation has expired or a previous request was declined. Oracle CRM On Demand therefore allows multiple requests to be made for the same accreditation for the same partner company as long as the request dates are different.

Updating the Accreditation Request Record

Only users with the appropriate access rights can update the accreditation request record. By default, only brand-owner roles, such as Channel Manager, can update the Status field on the request record. Brand-owner roles and partner roles can update all other fields.

Your company administrator can modify the default access right settings, as required.

Before you begin.

Your company administrator must have made the Accreditation Requests related information section available for the detail page. If the related information section is not displayed on the detail page, click the Edit Layout link, and add the section as a displayed related information section.

To update an accreditation request record:

1. In the Accreditation Requests section of the Accreditation Detail page, click the Edit link for the request record you want to modify.
2. Modify the fields as appropriate.
3. Click Save.

NOTE: The default permissible values for the Accreditation Status field are Requested, Granted, and Denied. However, this list is completely configurable and your company administrator can modify it to suit your business requirements.

Accreditation Fields

Use the Accreditation Edit page to add an accreditation or update details for an existing accreditation. The Accreditation Edit page shows the complete set of fields for an accreditation.

TIP: You can also edit accreditations on the Accreditation List page and the Accreditation Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help. Administrators can even add additional fields to be part of an accreditation.

The following table provides additional information regarding some fields.

Field	Description
Key Information Section	
Name	The name of the accreditation. This field is case sensitive, so be sure you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on to ensure you avoid creating duplicate accreditations. This field is required.
Type	The accreditation type that you want to use for this accreditation.
Status	The status of the accreditation, such as Planned or Available. Your administrator can modify the possible values for the status field, so you may see a set of values different from those mentioned here. This is a mandatory field.
Available From	The date from which the accreditation is available. This field, if specified, determines whether or not this accreditation is displayed on the Recently Introduced Accreditation list on the Accreditation homepage.
Accreditation ID	An internal identifier for the accreditation. Typically unique, but Oracle CRM On Demand does not enforce uniqueness.
Primary Product Product Category	The name of the primary product category that the partner company will be certified for upon successfully achieving the accreditation. Use this field only if the accreditation is focused on a single product category. If the accreditation is equally appropriate for several product categories, leave this field blank and use the Accreditation Product Product Categories related item section instead. If your administrator enforces the relationship between products and their product category, then the primary product and the primary product category on the record must be associated with each other, and the behavior is as follows: - If a product is already selected in the Primary Product field, and if you select a product category that is not associated with the selected product, then you cannot save your changes. - If you select a product category before you select a product in the Primary Product field, then when you click the Lookup icon in the Primary Product field, a list of the products that are associated with the selected product category is displayed. Your administrator can enforce the relationship between products and their product category by selecting the Enforce Product Category-Product Relationship check box on the company profile.
Primary Product	The name of the primary product that the partner company will be certified for upon successfully achieving the accreditation. Use this field only if the accreditation is focused on a single product. If the accreditation is equally appropriate for several products, leave this field blank and use the Accreditation Products related item section instead.

Field	Description
Available Till	The date after which the accreditation will no longer be available. This field, if specified, decides whether or not this accreditation is displayed on the Retiring Accreditations list on the Accreditation homepage.
Accreditation Details Section	
Validity (Months)	The length of time, in months, that the accreditation is valid after it has been awarded to a partner company.
Renewable	Indicates whether or not you can renew the accreditation awarded to a partner company.
Website	URL to a page that contains additional information about the accreditation. The Web site field is useful if the accreditation information is stored and maintained in some application other than Oracle CRM On Demand.
Currency	The currency used for the fee.
Accreditation Fee	The fee charged for awarding the accreditation.
Payment Options	The methods by which you can pay for the accreditation, such as a credit card or check. This is a single-value field. Multiple payment options may be allowed, for example, “Check or Credit”, “Cash or Credit”, and so on.
Contact Information Section	
Contact	Select the main point of contact for the accreditation. Use this field only if the point of contact already exists as a contact in Oracle CRM On Demand.
Contact: First Name	The first name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Last Name	The last name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Account	The account name of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
Contact: Email	The email address of the contact selected in the Contact field. This field is automatically populated based on what you select in the Contact field.
First Name	The first name of the point-of-contact for the accreditation. Use this field only if the point-of-contact is not already defined in Oracle CRM On Demand.
Last Name	The last name of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.

Field	Description
Company	The company name of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.
Email	The email address of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.
Phone	The phone number of the point-of-contact for the accreditation. Use this field ONLY if the point-of-contact is not already defined in Oracle CRM On Demand.
Additional Information	
Owner	The owner of the accreditation record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	Additional information about the accreditation record. This field has a limit of 2,000 characters.

Accreditation Request Fields

Use the Accreditation Request page to request an accreditation. The Accreditation Request page shows the complete set of fields for an accreditation request.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Key Request Information	
Accreditation	The name of the accreditation being requested. This field is required.
Objective	The objective, if any, for requesting the accreditation.
Request Date	The date of the requested accreditation. Defaults to the current system date during creation, but is modifiable during and after creation.
Accreditation Number	The accreditation number, which is usually unique, but Oracle CRM On Demand does not enforce uniqueness.
Renewable	Indicates whether or not the granted accreditation is renewable.
Partner	The name of the partner company requesting accreditation. This field is required.

Field	Description
Accreditation Date	The date on which the accreditation was awarded to the partner company.
Accreditation Status	The current status of the accreditation request.
Expiration Date	The date on which the awarded accreditation expires.
Additional Information	
Owner	The current owner of the accreditation request record.
Description	Additional information about the accreditation request. This field has a limit of 2,000 characters.

9 Life Sciences

Oracle CRM On Demand provides various record types for life sciences information, and for managing the pharmaceutical sales process.

The following tabs are available with Oracle CRM On Demand Life Sciences Edition:

Event. Use these pages to manage events, for example, educational events or customer events, and invitees to those events.

Contact State License. Use these pages to record the details of the state license (or other jurisdiction) to practice medicine, and validate signatures for samples that are dropped off by a sales representative.

Inventory Period. Use these pages to organize the sales force for planning and evaluating metrics (for example, to perform interim audit counts, final audit counts, and reconciliations).

Sample Transaction. Use these pages to create, update, and track different types of sample transactions (transfers, acknowledgements, adjustments, and disbursements or drop sample transactions) and associated transaction items.

Allocation. Use these pages to allocate samples to end users and to track the quantity of sample products as well as the period during which sample products are available for distribution.

Sample Lot. Use these pages to track lot numbers for sample products.

Sample Disclaimer. Use these pages to create, update, and track disclaimers for sample products.

Messaging Plan. Use these pages to manage messaging plans (presentations delivered using a personal computer or tablet computer for sales users).

Messaging Plan Item. Use these pages to specify the items that make up a messaging plan.

Messaging Plan Item Relation. Use these pages to specify a presentation item to provide optional information to support the primary messaging plan item.

Blocked Product. Use these pages to specify that certain products are blocked for certain contacts.

HCP Contact Allocation. Use these pages to create, update, and delete the allocations that are associated with health care professionals.

Life Sciences Processes

You can perform the following tasks using Oracle CRM On Demand Life Sciences Edition:

Tracking Events

You can plan and track events, for example, an educational event, using the Event pages. An event can be as simple as a lunch-and-learn session in a customer's office, or as complex as a seminar series or national-sales meeting for a company. For more information on planning and tracking events, see Events (on page 524).

Business Planning

The Business Planning pages provide a foundation for business-planning activities in the pharmaceutical industry. You can set the goals and objectives for accounts, contacts, and products. You can link these goals and objectives to long-term strategic plans, short-term objectives, hierarchical account plans, key opinion-leader plans, or brand plans. For more information on managing business plans, see Business Planning (on page 371).

Capturing Contact and Account Details and Planning Sales Calls

You can capture and store more detailed information about sales calls, using the call activity portion of the Contact Detail and Account Detail pages. These pages provide a list of call activities and show the call history for a contact or account. For more information on using the Contacts pages, see Contacts (on page 287). For more information on using the Account pages, see Accounts (on page 265) and Working with Activity Lists (on page 203).

Planning Sales Calls

Sales representatives can perform precall planning tasks for an account by reviewing the associated contact and account relationships. They can also review the best call times for the contact and the contact's valid medical license. This planning allows a sales representative to determine the following:

- Which products to explain
- How many samples or promotional items to drop
- Whose signature to capture to complete the sales call

For more information about these tasks, see Tracking Visits (Sales Calls) to Customers (on page 208), Tracking the Best Calling Times (on page 301), Contact State Licenses (on page 530), and Mass Call Planning (on page 213).

Capturing Customer Information to Meet Regulatory Guidelines

You can capture the following information about customer visits:

- Products detailed
- Samples dropped to customers
- Samples requested by customers
- Promotional or educational items dropped to customers
- Messaging plans discussed
- Message responses
- Customer signatures captured

This information is typically required to meet the regulations of the Food and Drug Administration (FDA) and similar agencies in other countries. You can store this information in the Call Activity List Page of a contact detail record. For more information on the Activity pages, see the following:

- Calendar and Activities (on page 189)
- Working with Activity Lists (on page 203)
- Tracking Visits (Sales Calls) to Customers (on page 208)

Managing Samples

Samples administrators can perform business processes, such as creating inventory periods, allocation records, and sample inventory records for sales representatives. Sales representatives can create inventory audit reports as requested by the samples administrator and can close out or reconcile inventory periods. Additionally, sales representatives can adjust inventories, transfer samples in and out, and drop samples, which create disbursement transactions. For more information about these tasks, see Managing Samples (on page 533).

Managing Customer Presentations

Sales and marketing organizations can manage their multimedia or graphic file content, create messaging plans, and distribute these messaging plans to the field sales force. Sales organizations can then deliver tailored presentations to customers while automatically capturing metrics related to customer responses. These metrics are passed to the marketing organization to analyze. Use Oracle CRM On Demand Life Sciences Edition with an offline client application. The client is required for making presentations to customers and capturing the metrics of customer responses. To manage the presentation content and the messaging plans, use Personalized Content Delivery (PCD), a type of sales presentation software. For more information on PCD, see Personalized Content Delivery (see Personalized Content Delivery on page 611).

Managing Analytics

A sales representative, marketing organization, management team, or an administrative team within a pharmaceutical company can create detailed analytical reports within Analytics. Call History, Events, and PCD have analytics components that allow you to manage analytics in these areas of Oracle CRM On Demand Life Sciences Edition. For more information on using Analytics, see Getting Started with Analytics (on page 816).

Creating Integration Events and Workflow Rules

Integration Events are supported for the following life sciences record types and life sciences-related record types:

- Activity
- Business Plan
- Campaign
- Contact State License
- Event
- Fund
- Fund Request
- HCP Contact Allocation
- Inventory Period
- MDF Request
- Messaging Plan
- Objective
- Order
- Sample Inventory
- Sample Lot
- Sample Request
- Sample Request Item
- Sample Transaction
- Transaction Item

For more information about integration events and workflow rules, see About Integration Events (on page 1848) and Creating Workflow Rules (on page 1511).

Performing Activity Assessments

If your company administrator has set up Activity Assessment scripts, then you will be able to perform assessments on tasks, appointments, calls, or planned calls for an account or contact. For more information about assessments, see Setting Up Assessment Scripts (on page 1865) and Using Activity Assessment Scripts (on page 227).

Adding Books to Life Sciences Record Types

Books are supported for the following life sciences record types and life sciences-related record types:

- Allocation
- Business Plan
- Event
- HCP Contact Allocation

- Inventory Audit Report
- Inventory Period
- Objectives
- Sample Lot
- Sample Transaction

You can determine which book a user sees by default in the Book selector for each record type. For more information, see Setting Up Default Books by Record Type for a User (on page 1377). For more information about books in general, see Book Management (on page 1421).

Events

Use the Event pages to plan and track events, such as an educational seminar, a symposium, or a customer appreciation event. An event can be as simple as a lunch-and-learn session in a customer's office, or as complex as a seminar series or a national sales meeting.

NOTE: Although the Event and the associated Invitee record types are packaged with Oracle CRM On Demand Life Sciences Edition, you can request that Oracle CRM On Demand Customer Care set them up for your company, even if the company is not a company that uses Oracle CRM On Demand Life Sciences Edition. Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking events, then the Event tab might be excluded from your setup.

Working with the Event Homepage

The Event Homepage is the starting point for managing events.

NOTE: Your company administrator can customize the layout of your Event Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating an Event

You can create an event by clicking the New button in the My Recently Viewed Events section. For more information, see Creating Records (on page 51) and Event Fields (on page 528).

Working with Event Lists

The Event Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for an event.

Event List	Filters
All Events	All events, sorted alphabetically on event name
All Events This Month	Events with Status = Active, In Progress, or Planned and with Start Date that falls within the current month.
All Current Events	Events that meet both these conditions: - Status = Active, In Progress, or Planned - Start Date falls in the range of 30 days before today to 60 days after today.
Recently Created Events	All events, sorted by the created date

Event List	Filters
Recently Modified Events	All events, sorted by the modified date
My Events	Events with your name in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Events

The My Recently Modified Events section shows the events you modified most recently.

Viewing Event-Related Tasks

The Event-Related Tasks section shows the tasks assigned to you, sorted by due date and then priority. It also shows the following information:

- **Due Date.** Date task is due as set by you or your manager.
- **Arrow.** The priority for tasks as set by you or your manager, such as 1-High, 2-Medium, or 3-Low. The task priority is indicated by arrows: an up arrow for high priority, no arrow for medium priority, and a down arrow for low priority.

  NOTE: If your company administrator changes the display values for the Priority field from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless your company administrator uses the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that your company administrator gives to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that your company administrator adds to the picklist for the Priority field. For more information about changing the default values for picklists, such as the Priority field, see Changing Picklist Values (on page 1254).

- **Subject.** Title of task. Click the link to review the task.
- **Event.** The event associated with the task.

To expand the list, click Show Full List.

Adding Sections to Your Event Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Event Homepage:

- Event-Related Tasks
- Recently Created Events
- Recently Modified Events
- My Recently Created Events
- My Recently Modified Events
- One or more report sections (Your company administrator can make report sections available for display on your Event Homepage.)

To add sections to your Event Homepage

1 On the Event Homepage, click Edit Layout.
2 On the Event Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3 Click Save.

Related Information

See the following topics for related event information:

- Events (on page 524)
- Managing Events (on page 526)
- Event Fields (on page 528)

Managing Events

For information about managing events and invitees, see:

- Tracking Invitees to Events (on page 526)
- About Event and Appointment Synchronization (on page 228)

NOTE: The Events feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Working with Records (on page 46)
- Transferring Ownership of Records (on page 145)
- Deleting and Restoring Records (on page 173)
- Viewing Audit Trails for Records (on page 175)
- Sharing Records (Teams) (on page 146)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related event information:

- Events (on page 524)
- Event Fields (on page 528)
- Working with the Event Homepage (on page 524)

Tracking Invitees to Events

You can take the following actions with invitees:

- Track the invitees to an event by their signatures, for example, to confirm the invitee's attendance at a trade show event and store feedback about the event invitation.

- Add an unlimited number of invitees to an event. However, the maximum number of invitees that you can add at one time is 145. That is, you can add an unlimited number of invitees, but in groups of up to 145 individuals.
- Add a single invitee or multiple invitees to an event from an Event Detail page. You can also add a single contact as an invitee for an event from a Contact Detail page.

You can also optionally associate accounts, leads, and opportunities, with events, if your administrator makes the Account Event, Lead Event, and Opportunity Event related information sections available in your Event Detail page layout.

To track invitees to an event (from an Event record)

1 Select the Event record.

   For instructions on selecting events, see Finding Records (on page 74).

2 On the Event Details page, scroll to the Invitees section.

   NOTE: To add the Invitees section to the Detail page layout, see Changing Your Detail Page Layout (on page 749).

3 On the Invitees title bar, add invitees by doing one of the following:
   - Click New to add a single invitee to the event at one time.
   - Click Add to add up to five invitees to the event at one time.
   - Click List Add to add more than five invitees to the event at one time.

   NOTE: If you plan to use the Event record in the Oracle CRM On Demand Disconnected Mobile Sales application, then do not click List Add to add invitees because the modification tracking required for synchronization is not supported for this record type. Click Add or New instead. Clicking Add or New opens different Invitees Detail pages that enable you to update either single Invitee records or up to five Invitee records at one time. Clicking List Add opens a Contact Search window that enables you to select more than five contacts as invitees at one time.

4 If you clicked New or Add, complete or update the following information on the Invitees Detail page:
   a In the Contact Name field, click the Lookup icon to select an existing contact to add as an invitee. (This is a required field.)

      The event name defaults to the event name from the Event Detail page.

   b In the Invitee Status field, select the invitee's status from the drop-down list. The default status is set to Pending. (This is a required field.)
   c Add the information for the Session Details and Comments fields, as required.
   d Save the Invitees record.

   NOTE: Depending on whether you click New or Add on the Invitees title bar, you open different Invitees Detail pages that allow you to update either single Invitee records or multiple Invitee records at one time.

5 If you clicked List Add, then select all the contacts that you want to add as invitees in the Contact Search window, and after you have finished your selections, click OK.

   NOTE: You can filter your search by using Books, and you can search by account name, contact type, last name, and first name. You can also add new contacts from the Search window by clicking New. If you must update any of the default values for the Invitee fields of the Invitee records that are created, then edit them by using inline editing on the Event Detail page, or use the Invitee Detail page.

6 On the Event Detail page, update the fields as required.

   For information on the Event fields, see Event Fields (on page 528).

7 If invitees to the event are required to provide their signatures, for example, to confirm their attendance to the event, and if your administrator has set up the Signed Status field on the Invitee page layout, then you can check the status of this field in each of the Invitee records.

After a signature is obtained, an external application such as Oracle CRM On Demand Disconnected Mobile Sales validates and sets the Signed Status field through Web services. After this field has been set, you cannot clear it using the Oracle CRM On Demand UI. To view additional details for the signature such as the contact name, or the date and time of the signature capture, you must view the signature related item record for the contact record corresponding to the invitee.

8 If your administrator makes the Account Event, Lead Event, and Opportunity Event related information sections available in your Event Detail page layout, then you can click Add in the relevant related information section to add accounts, or leads, or opportunities that are targeted for the event.

   You can remove any of the invitees, accounts, leads, or opportunities that are in place in the related information item sections, as required, by clicking the Delete link in the record-level menu. You can also view the invitee, account event, lead event, and opportunity event records by clicking View in the record-level menu.

   NOTE: You cannot create new accounts, leads, or opportunities in the related information item sections. Your administrator can also set up event records as related information items for account, lead, or opportunity records so that you can view all the events in which an account, lead, or opportunity participates.

9 Save the Event record.

10 (Optional) For any Event record, you can create a new Invitee record from an Invitee Detail page as follows:

   a In the Event record, go to the Invitees section and select View from the drop-down list for an Invitee record.

   b On the Invitee Detail page, click New and complete the fields for the new Invitee record.

   c Click Save to save the new Invitee record.

      Oracle CRM On Demand returns you to the Detail page for the first Invitee listed in the Invitees section. To view the new Invitee record that you created, go back to the Event Detail page. The newly created Invitee record is listed in the Invitees section.

To track invitees to an event (from a Contact record)

1 Select the Contact record.

   For instructions on selecting contacts, see Finding Records (on page 74).

2 On the Contact Detail page, scroll to the Event section.

   NOTE: To add the Event section to the Detail page layout, see Changing Your Detail Page Layout (on page 749).

3 On the Event title bar, click New to add a single invitee to the event.

   On the Invitees edit page, the contact name defaults to the contact from the Contact Detail page.

4 In the Invitee Status field, select the invitee's status from the drop-down list. (This is a required field.)

   The default status is set to Pending.

5 Use the Events lookup selector to choose an event for the invitee. (This is a required field.)

6 Add the information for the Session Details and Comments fields, as required.

7 Save the Invitees record.

   Oracle CRM On Demand lists the contact as an invitee under the Invitees section on the Event Detail page, and lists the event under the Event section on the Contact Detail page.

Event Fields

Use the Event Edit page to add an event or update details for an existing event. The Event Edit page shows the complete set of fields available for an event.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Event Detail Information	
Name	Name of the event, up to 150 characters. Required field by default.
Location	Limit of 100 characters.
Start Date	Defaults to the current date and time. Required field by default.
End Date	Defaults to one hour later than the current date and time. Required field by default.
Confirm Date	Target date for sending out confirmation about the event to the invitees.
Status	The status of the event. Default values are Active, Cancelled, Completed, In Progress, Inactive, and Planned.
Type	The type of event. Limit of 30 characters. Default values are CD_ROM Presentation, Conference, Hospital Display, Journal Club, Lunch and Learn, Meeting, Rounds, Seminar, Symposium, Tradeshow, and Trading.
Budget	Budget amount in the currency you specify. The default is set to the System currency. Your Administrator sets the currency using the Activity Currency field. This field must be added to the Event page layout by your company administrator if you want to use it. For information on adding fields to page layouts, see Customizing Static Page Layouts (on page 1267).
Max Attendees	Maximum number of invitees allowed to attend this event.
Product	Product that you want to highlight during the event. You can select either the product or the product category, but not both. To add products, your company administrator navigates to Admin and clicks Content Management.
Product Category	Product category that you want to highlight during the event. You can select either the product or product category, but not both. To add product categories, your company administrator navigates to Admin and clicks Content Management.
CME Credit	Number of Continuing Medical Education (CME) credits for this event. **NOTE:** Your administrator can customize this field by using a more generic name, such as CE Credit, for Continuing Education credits.
Additional Information	

Field	Description
Owner	The owner of the Event record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run in the Analytics pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Owner Full Name	The owner of the Event record.
Event Objective	Limit of 500 characters. Required field by default.
Description	Limit of 250 characters.
Session Details	Details regarding session. Limit of 500 characters.
Owner Full Name	The owner of the Event record.
Modified	The date and user who last modified this event.

Related Information

See the following topics for related event information:

- Events (on page 524)
- Working with the Event Homepage (on page 524)
- Managing Events (on page 526)

Contact State Licenses

Use the Contact State License pages to create, update, and track contact state licenses for a contact.

A *contact state license* records the details of the state license (or another jurisdiction) to practice medicine. It is used to validate the signatures for samples that a sales representative drops (for example, a pharmaceutical sales representative) to a contact (for example, a physician). A physician has only one valid active license for each state at any time. Licenses to practice in a particular jurisdiction are renewable. If the implementation is outside the U.S., the State field is not required.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Contact State License information, the Contact State License tab might be excluded from your setup.

Working with the Contact State License Homepage

The Contact State License Homepage is the starting point for managing contact state license records.

NOTE: Your company administrator can customize the layout of your Contact State License Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Contact State License

You can create a new contact state license by clicking the New button in the Recently Modified Contact State Licenses section. For more information, see Creating Records (on page 51) and Contact State License Fields (on page 532).

Working with Contact State License Lists

The Contact State License Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for contact state licenses.

Contact State License List	Filters
All Contact State Licenses	All contact state licenses to which you have visibility regardless of who owns the contact state license.
Recently Modified Contact State Licenses	All contact state licenses with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Contact State Licenses

The Recently Modified Contact State Licenses section shows the Contact State Licenses that you viewed most recently.

Click Show Full List to expand the list.

Adding Sections to your Contact State License Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Contact State License Homepage:

- Recently Created Contact State Licenses
- Recently Modified Contact State Licenses
- My Recently Created Contact State Licenses
- My Recently Modified Contact State Licenses
- Additional report sections (Your company administrator can make report sections available for display on your Contact State License Homepage.)

To add sections to your Contact State License Homepage

1. On the Contact State License Homepage, click Edit Layout.
2. On the Contact State License Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Contact State Licenses

For step-by-step procedures for managing contact state licenses, see the following topics:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related contact state license information:

- Contact State Licenses (on page 530)
- Working with the Contact State License Homepage (on page 530)
- Contact State License Fields (on page 532)

Contact State License Fields

Use the Contact State License Edit page to add a contact state license or update the details for an existing contact state license. The Contact State License Edit page shows the complete set of fields for a contact state license.

TIP: You can also edit contact state licenses on the Contact State License List page and the Contact State License Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in lists. So, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some of the contact state license fields.

Field	Description
Contact	The contact for this state license record, typically a physician or pharmaceutical representative. Click the Lookup icon to choose a contact. (Required.)
License Number	The license number for the contact, for example, PS4231732. (Required.)
State	The U.S. state or jurisdiction associated with the license number. Use the picklist to select the state, for example, *NJ* for New Jersey. **NOTE:** If your jurisdiction is outside the U.S., the State field is not required.
Expiration Date	The date when the license expires (MM/DD/YYYY), for example, 10/31/2009. Use the calendar icon to select the expiration date.
Status	The status of the license, which can be Active or Inactive. - **Active.** Set this field to Active when the state license has been validated.

Field	Description
	■ **Inactive.** Set this field to Inactive when the state license is no longer required.

Related Information

See the following topics for related information about contact state licenses:

- Contact State Licenses (on page 530)
- Working with the Contact State License Homepage (on page 530)
- Managing Contact State Licenses (on page 532)
- Setting the Maximum Number of Times Contacts Can Be Sampled Without a Valid State License (on page 1879)

Managing Samples

Most major pharmaceutical manufacturers provide free samples to health care professionals as part of their regular field sales activities. In the U.S, samples distribution is regulated by the Food and Drug Administration (FDA) and must be reconciled at least once a year. This topic describes how to manage and maintain an electronic inventory of samples and promotional items using Oracle CRM On Demand Samples Management. Administrators can set up and maintain a sample inventory, and monitor samples delivery, transfers, receipts, discrepancies, adjustments, and inventory counts. End users use samples management in Oracle CRM On Demand to track an electronic inventory of samples stock, create sample transfers, acknowledge receipt of sample transfers, and adjust inventory balances for reconciliation purposes.

Samples management in Oracle CRM On Demand allows samples administrators and sales representatives to measure and monitor sample drops at every level of the organization. For more information about the differences between samples administrator and end-user tasks, see the following topics.

Scenario for Managing Samples

This topic provides one example showing the process performed by a samples administrator and the sales representatives (end users) who distribute samples to health care professionals. Your company might follow a different process according to its business requirements.

A pharmaceutical company has new products to bring to market. To set up a samples inventory, the samples administrator adds the products to the database, associates any lot numbers, allocates samples to the sales representatives, and transfers samples to the managers and sales representatives in the field. The sales representatives then visit the doctors in their territories and drop the new samples. After a month goes by, each sales representative is required by headquarters to reconcile his or her inventory. The sales representative first provides a final count of each inventory record and a new inventory period begins. The sales representative realizes that there are some discrepancies in the inventory when running the reconciliation. After making the necessary adjustments, the sales representative performs a successful reconciliation and marks the inventory as Completed and Reconciled.

In this scenario, samples administrators are responsible for their company's samples inventory and making sure it complies with regulatory rules and guidelines. In this role, they take responsibility for establishing a master samples inventory and then transferring samples to each end user. When end users receive a shipment, they submit a receipt or acknowledgement of the inventory. Oracle CRM On Demand automatically enters the received samples into their inventory counts.

In this scenario, the sales representative, the sales representative's manager, and the samples administrator can monitor discrepancies between shipped quantities and received quantities.

Administrator Procedures

Samples administrators require administrative responsibilities in samples management in Oracle CRM On Demand to carry out the following tasks:

- Define samples as products and add them to the Oracle CRM On Demand database. For more information about setting up products for your company, see Content Management (on page 1853).
- If your organization uses lot numbers to track samples, then define lot numbers and associate lot numbers with sample products. For more information, see Sample Lots (on page 593).
- Set up an inventory of samples. Each record in the sample inventory provides information to the sales representative about the product that has been categorized as qualifying for sample drop processing. For more information, see Sample Inventory (on page 543).
- Set up allocations and allocate samples to sales representatives. The allocation record determines the period of time within which sample products are provided for the sales representative to distribute to clinics, hospitals, or physician contacts when executing a sample drop call. The allocation record also defines the limits associated with the sample (for example, the maximum quantity that is allowed to be dropped during one call). For more information, see Allocations (on page 585).

  If your samples-management scheme supports blocking a product from a specific health care professional (HCP) or supports limiting the quantity of a specific product that is available to the health care professional, then for more information on allocations, see HCP Contact Allocations (on page 590) or Blocked Products (on page 643).
- Set up an inventory period, which is the defined period within which the movement of samples or promotional items can be tracked. Administrators and sales representatives perform all initial counts, interim audit counts, final audit counts, reporting, and reconciliations within the inventory period. For more information, see Inventory Period (on page 535).
- Transfer samples to end users in the field. For more information, see Creating a Samples Transfer (on page 553).
- Monitor samples activities. Activities to monitor include sample drops, sample transfers between employees and headquarters, user inventory counts, and inventory adjustments. For more information, see Monitoring Sample Activities (on page 578).
- Check electronic signatures. Electronic signatures are captured by sales representatives and are stored in the Oracle CRM On Demand database. For more information about signatures, see Checking Electronic Signatures (on page 575).

End-User Procedures

The end users are the sales representatives who distribute samples to health care professionals, and they carry out the following tasks:

- Acknowledge receipt of sample inventory (that is, of sample transfers). For more information, see Acknowledging Receipt of the Sample Inventory (on page 545).
- Transfer samples to other end users or back to headquarters. Sales representatives can exchange samples among themselves and return samples (for example, samples that have expired) to headquarters. For more information, see Creating a Samples Transfer (on page 553).
- Drop samples during sales visits to customers. For more information, see Dropping Samples During a Sales Call (on page 558).
- Capture electronic signatures for the samples that are dropped. The electronic signatures that are captured by sales representatives are uploaded to the Oracle CRM On Demand database. For more information about signatures, see About Electronic Signatures (on page 574).
- Perform interim inventory counts as required. For more information, see Requesting an Interim Inventory Count (on page 540).
- Close out inventory periods as required. For more information, see Closing Out an Inventory Period (on page 541).
- Account for any discrepancies in inventory records by performing inventory adjustments and submitting other transactions. For more information, see Adjusting Sample Transactions (on page 555), Creating Lost and Found Sample Transactions (on page 556), Viewing Disbursement Transactions (on page 557).

- Reconcile the inventory as required. For more information, see Process of Reconciling the Inventory (on page 545).

Requirements for Managing Samples

The following requirements apply to administrators and end users:

- **Administrators.** Before you can manage samples in Oracle CRM On Demand, administrators must first define the products. For more information about setting up products for your company, see Content Management (on page 1853).
- **End users.** Before end-users can drop samples, they must have an associated allocation record for the samples, and they must acknowledge receipt of the samples. For more information about allocations and acknowledgments, see Allocations (on page 585) and Acknowledging Receipt of the Sample Inventory (on page 545).

Also, to manage samples, administrators and end users must have the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege in their user role. For information about the user role and access profile settings that are required to check electronic signatures, see Checking Electronic Signatures (on page 575).

Inventory Period

Use the Inventory Period pages to create, update, and track inventory periods. An *inventory period* is a defined period within which all movement of samples or promotional items (sample drops, receipts, transfers, and inventory adjustments) can be tracked. The inventory period is defined by the samples administrator for the customer company. It is used to organize the sales force through planning and evaluating metrics.

Samples administrators and sales representatives perform all initial counts, interim audit counts, final audit counts, and reconciliations within the inventory period:

- **Initial Count.** The initial count is performed by the sales representative upon receipt of a new inventory. Sales representatives must physically count all samples that they receive and acknowledge that the items are in their possession. For more information, see Acknowledging Receipt of the Sample Inventory (on page 545).
- **Interim Audit Count.** The samples administrator can request an interim audit count at any time. It is a request to count the inventory and report on it. An interim audit count is often performed as a special case audit where potential fraud activity has occurred, or there appears to be a process issue with tracking the inventory. It acts as a checkpoint for the samples administrator. For more information, see Requesting an Interim Inventory Count (on page 540).
- **Final Audit Count.** The samples administrator requests the final audit count. In this case, the inventory period is coming to an end, and all samples must be accounted for. The sales representative must count and log the final physical count for each sample, and submit the final audit report. To create an audit report, the sales representative can go to the Inventory Audit Report Homepage, and create a new inventory audit report. The sales representative can also trigger the automatic creation of the final audit report, for more information, see Closing Out an Inventory Period (on page 541).
- **Reconciliation.** When the final audit count is complete, the sales representative must reconcile the inventory. For this reconciliation, the tracking of internal, sample transactions is compared with the final physical count. Any discrepancies are logged. If no discrepancies exist, the reconciliation is successful, and the inventory period is marked as reconciled. For more information, see Correcting Physical and Electronic Count Discrepancies (on page 558) and Reconciling an Inventory Period (on page 541).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking inventory period information, the Inventory Period tab might be excluded from your setup.

Types of Inventory Periods

Because reconciling samples inventory can happen as often as once a month, Oracle CRM On Demand Samples Management allows you to reconcile as often as the samples administrator requests you to. It provides three types of inventory periods for maximum flexibility.

The following table describes the types of inventory periods.

Inventory Period	Description
Active	The current period. It shows no end date, and it is not reconciled. You can enter any type of samples transaction, including adding new products. Inventory counts are adjusted accordingly.
Inactive	A past, unreconciled period. It shows an end date, but it has not been reconciled yet. You can enter any type of samples transaction, except new products to the inventory. The inventory counts are affected accordingly. The default configuration for Oracle CRM On Demand provides one inactive period.
Reconciled	A past, inactive period. It shows an end date and has been successfully reconciled. You cannot perform transactions on this locked-down inventory period.

The default configuration in Oracle CRM On Demand for samples management provides for three unreconciled periods: one active period and two inactive periods. You can have multiple reconciled inventory periods, but only one active inventory period open at any time.

Working with the Inventory Period Homepage

The Inventory Period Homepage is the starting point for managing inventory periods. This page contains several sections and displays information that is relevant to you.

NOTE: Your company administrator can customize the layout of your Inventory Period Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Before you begin. To work with inventory periods, your user role must include the Enable Basic Samples Operations privilege.

Creating an Inventory Period

Only the sample administrator for the company can create an inventory period. Sales representatives cannot create inventory periods. The samples administrator creates the initial inventory period for each sales representative who uses Oracle CRM On Demand Life Sciences Edition. For more information, see Creating Inventory Periods for Users (on page 1384) and Creating Records (on page 51).

Working with Inventory Period Lists

The Inventory Period List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for inventory periods.

Inventory Period List	Filters
All Inventory Periods	All inventory periods to which you have visibility, regardless of who owns the inventory period.

Inventory Period List	Filters
Recently Modified Inventory Periods	All inventory periods with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Inventory Periods

The Recently Modified Inventory Periods section shows the inventory periods most recently modified.

Click the Show Full List link to expand the list.

Adding Sections to Your Inventory Period Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Inventory Period Homepage:

- Recently Created Inventory Periods
- Recently Modified Inventory Periods
- My Recently Created Inventory Periods
- My Recently Modified Inventory Periods
- Additional report sections (Your company administrator can make report sections available for display on your Inventory Period Homepage.)

To add sections to your Inventory Period Homepage

1. On the Inventory Period Homepage, click Edit Layout.
2. On the Inventory Period Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Related Information

See the following topics for related information about inventory periods:

- Inventory Period (on page 535)
- Inventory Period Fields (on page 542)
- Managing Inventory Periods (on page 537)

Managing Inventory Periods

For step-by-step procedures for managing inventory periods, see:

- Adding Sample Inventory to an Inventory Period (on page 538)
- Adding Sample Transactions to an Inventory Period (on page 539)
- Adding Books to an Inventory Period (on page 539)
- Creating an Inventory Audit Report for an Inventory Period (on page 539)
- Requesting an Interim Inventory Count (on page 540)
- Closing Out an Inventory Period (on page 541)
- Reconciling an Inventory Period (on page 541)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about inventory periods:

- Inventory Period (on page 535)
- Inventory Period Fields (on page 542)
- Working with the Inventory Period Homepage (on page 536)

Adding Sample Inventory to an Inventory Period

Sample administrators use the Sample Inventory Edit page to add a sample inventory line item to an inventory period for a sales representative, or update details for an existing sample inventory line item. The Sample Inventory Edit page shows the complete set of fields for sample inventory.

Sales representatives cannot add or delete sample inventory line items in an inventory period. However, when performing interim and final audit counts, sales representatives must edit the Physical Count field in the sample inventory line item in an inventory period. For more information about audit counts, see Requesting an Interim Inventory Count (on page 540) and Closing Out an Inventory Period (on page 541).

Before you begin. To add sample inventory line items to an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To add a sample inventory line item to an inventory period

1. On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.
2. On the Inventory Period Detail page, click New in the Sample Inventory section.
3. On the Sample Inventory Edit page, complete the required fields. Then click Save.

   For more information about the fields on this page, see Sample Inventory Fields (on page 546).

NOTE: This procedure is suitable if you are adding small numbers of products. For adding multiple inventory records, it is recommended that you create an import file (consisting of the appropriate inventory records), and then ask your company administrator to load the data into the inventory period.

Related Topics

See the following topics for related, sample inventory information:

- Sample Inventory (on page 543)
- Managing Sample Inventory (on page 543)
- Sample Inventory Fields (on page 546)

Adding Sample Transactions to an Inventory Period

Use the Sample Transaction Edit page to add a sample transaction line item to an inventory period, or update details for an existing sample transaction line item. The Sample Transaction Edit page shows the complete set of fields for a sample transaction.

Before you begin. To add sample transactions to an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To add a sample transaction to an inventory period

1. On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.
2. On the Inventory Period Detail page, click New in the Sample Transactions section.
3. On the Sample Transaction Edit page, complete the required fields. Click Save.

   For more information about the fields on this page, see Sample Transaction Fields (on page 579).

Related Information

See the following topics for related, sample transaction information:

- Sample Transactions (on page 550)
- Working with the Sample Transaction Homepage (on page 550)
- Managing Sample Transactions (on page 552)
- Sample Transaction Fields (on page 579)

Adding Books to an Inventory Period

Use the following procedure to add books to the active inventory period. When you add a book to the active inventory period, you can then modify or remove the book. This procedure assumes that the book is displayed as a related item on the Inventory Period detail page. For more information about displaying related items, see Customizing Related Item Layouts (on page 1258).

To add a book to an inventory period

1. On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.
2. On the Inventory Period Detail page, click Add in the Books section of the page.
3. In the book selector, choose the book that you want to add to the inventory period, and then click OK.

   For more information about books, see Book Management (on page 1421).
4. When required, close out the inventory period by clicking the Close Out button.

   When an inventory period is closed, an inventory audit report is generated, and a new inventory period is created. All sample inventory and book information attached to the closed inventory period is copied to the new inventory period and inventory audit report. For more information, see Closing Out an Inventory Period (on page 541).

Creating an Inventory Audit Report for an Inventory Period

Use the Inventory Audit Report Edit page to create an inventory audit report for an inventory period or update details for an existing inventory audit report. The Inventory Audit Report Edit page shows the complete set of fields for an inventory audit report.

Before you begin. To create an inventory audit report for an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To create an inventory audit report for an inventory period

1. On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want
2. On the Inventory Period Detail page, click New in the Inventory Audit Reports section.
3. On the Inventory Audit Report Edit page, complete the required fields, and click Save.

   For more information about the fields on this page, see Inventory Audit Report Fields (on page 548).

   After you create an inventory audit report, you cannot change it. If an error is noted in a generated inventory audit report, you must make an inventory adjustment to correct the error first, and then generate a new inventory audit report after the inventory adjustment has been processed.

Related Topics

See the following topics for related information about inventory audit reports:

- Inventory Audit Report (on page 547)
- Managing Inventory Audit Reports (on page 547)
- Inventory Audit Report Fields (on page 548)

Requesting an Interim Inventory Count

When sales representatives return to their office, they are generally required to do a physical inventory count. They request an interim inventory count, which allows them to audit their inventory of samples and submit the information to the samples administrator. The samples administrator typically issues a requirement for a physical audit of inventory. The interim audit is based on corporate guidelines. An interim audit count is often performed as a special-case audit where potential fraud activity has occurred, or there appears to be a process issue with tracking the inventory. It acts as a checkpoint for the samples administrator.

You can count your physical inventory at any time during the active, unreconciled inventory period. Only active inventory periods are considered when you request an interim inventory count.

Before you begin. To request an interim inventory count, your user role must include the Enable Basic Samples Operations privilege.

To request an interim inventory count

1. On the Inventory Period List page, drill down on the Start Date field to open the inventory period record on which you want to perform an audit.
2. For each Sample Inventory line item, enter a value in the Physical Count field.

   The value that you enter in the Physical Count field must correspond to the physical quantities that you have on hand for each product.
3. Click Interim Count.

   Then the following occurs:

   - The value in the Last Physical Count field changes to reflect the physical quantity value prior to your current physical quantity value. Then you can validate and compare the old physical count with the new physical count.
   - A new inventory audit report is created where all line items are copied over from the current inventory.
   - The current inventory period remains open.

   NOTE: The Interim Count button is enabled for inventory periods that are active only.

Closing Out an Inventory Period

As an inventory period closes, the sales representative must count and log the final physical count for each sample, and submit the final audit report. The sales representative submits the final audit count (either by product or lot number) by closing out the inventory period. When you close out an inventory period, you are closing it and triggering the creation of an inventory audit report. You can close out active inventory periods only.

Closing out an inventory period is also an important step in Process of Reconciling the Inventory (on page 545).

Before you begin. To close out an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To close out an inventory period

1. On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want to close out.
2. For each Sample Inventory line item, enter a value in the Physical Count field.

   The value that you enter in the Physical Count field must correspond to the physical quantity that you have on hand for each product.
3. Click Close Out.

   When you click Close Out, the following happens:

   - The inventory period that you opened in step 1 is closed by assigning an inventory period end date, and a new inventory period is created containing all the records that were in the old inventory period.
   - The values from the Physical Count field (in the Sample Inventory records) in the old inventory period are copied to the Opening Balance field (in the corresponding Sample Inventory records) in the new inventory period.
   - All samples that have not expired are copied from the old inventory period to the new inventory period.
   - Any expired samples with a quantity greater than zero are copied from the old inventory period to the new inventory period.
   - All book information associated with the old inventory period is copied to the new inventory period.
   - An Inventory Audit Report is created. All sample inventory and book information associated with the old inventory period is copied to the new Inventory Audit Report.

   NOTE: When you click the Close Out button, an error message appears if the status of the inventory period is not Active, or if the Physical Count field is empty in any of the sample inventory records.
4. Go back to the Inventory Period List page, and open the same inventory period record that you opened in Step 1.

   Notice that an inventory audit report has been created as a child of the closed inventory period. The inventory audit report contains a snapshot of the inventory records and the final physical count when the inventory period closes. The inventory audit report and its associated records are locked, cannot be changed, and remain as a historical audit trail for the samples administrator.

Reconciling an Inventory Period

Sales representatives are required to reconcile their samples at least once a year. You can start reconciliations at various times during the year, but only on inventory periods that have been closed. All transactions associated with an inventory period must be completed before the inventory period can be fully reconciled.

Reconciling an inventory period is the final step in Process of Reconciling the Inventory (on page 545).

Before you begin. To reconcile an inventory period, your user role must include the Enable Basic Samples Operations privilege.

To reconcile an inventory period

1. On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want to reconcile.

   The inventory period that you open must be closed. You can reconcile a period only if there is no difference between the physical count and the amount that Oracle CRM On Demand calculates, and if there are no pending transactions in the inventory period.
2. Click Reconcile.

   An error message is displayed if any of the following conditions are true:
   - There are transactions associated with the inventory period that have a status of In Progress.
   - There are previous inventory periods that are still open.
   - The variance is not within an acceptable limit. Currently, the variance is set to zero.
3. Go back to the Inventory Period List page, and open the same inventory period record that you opened in Step 1. If the reconciliation is successful, the Reconciled flag is selected.

NOTE: End users must create transfer transactions for any samples transferred to another representative or returned to headquarters for the period before the reconciliation. Also, mobile users must synchronize their local database with the server database before submitting an inventory count. This synchronization is important if they are recording samples received in a prior period, or if they are recording samples received in a period that has not become active yet.

Inventory Period Fields

Use the Inventory Period Edit page to add an inventory period or update details for an existing inventory period. The Inventory Period Edit page shows the complete set of fields for an inventory period.

TIP: You can also edit inventory periods on the Inventory Period List page and the Inventory Period Detail page. For more information about updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the inventory period fields. Most of these fields are read only for sales representatives, but editable for sample administrators. The Active field and the Reconciled field are automatically set by Oracle CRM On Demand according to whether or not an inventory period has completed or been reconciled.

Field	Description
Start Date	The start date for this inventory period.
End Date	The date that this inventory period expires.
Active	This check box is automatically set by Oracle CRM On Demand and indicates whether the inventory period is active or closed: ■ If selected, then this inventory period is currently active. All current dropped samples and promotional items use this active inventory period for processing. ■ If not selected, then this inventory period has completed, or has been closed out, and is inactive. For more information, see Closing Out an Inventory Period (on page 541).

Field	Description
Owner	The owner of this inventory period.
Created	The date and user who created this inventory period.
Modified	The date and user who last modified this inventory period.
Reconciled	Oracle CRM On Demand sets this check box automatically. It indicates whether or not the reconciliation process has been successfully run for this inventory period: - If selected, then this inventory period has been fully reconciled with no discrepancies, is inactive, and locked. - If not selected, then this inventory period has not been successfully reconciled. For more information, see Reconciling an Inventory Period (on page 541).

Related Topics

See the following topics for related information about inventory periods:

- Inventory Period (on page 535)
- Managing Inventory Periods (on page 537)
- Working with the Inventory Period Homepage (on page 536)

Sample Inventory

Use the Sample Inventory pages to create, update, and track sample inventory records.

A *sample inventory* record tells the sales representative about the product that has been categorized as qualifying for dropping a sample. The samples administrator approves the product and assigns a quantity to the sales representative. The sales representative can keep the sample until she can distribute it to a validated physician, clinic, or hospital facility. A sample inventory record can be defined at the product level or at the sample lot level. Rules about the quantity that can be distributed to any given contact are kept in the allocation record for that product sample. The allocation record and the sample inventory record track the process of executing a sales call and dropping a sample or promotional item.

About the Tracking Process for Sample Inventory Records

When the samples administrator sends sample shipments to end users in the field, the sales representative must acknowledge receipt of the sample inventory. The sales representative must physically receive the sample inventory, count it, and acknowledge the quantity. This process forms the starting point for the sample inventory tracking process, and ultimately results in reconciling the inventory at the end of the inventory period.

During an inventory period, the sales representative might have requests from the samples administration manager to perform audits on an inventory. Then, the sales representative uses the sample inventory records to generate an inventory audit report. When an inventory period ends, the inventory is counted and maintained in the sample inventory record and the remaining inventory is copied to the new inventory period. Reconciling the inventory period confirms that the inventory matches the calculations obtained by processing the transaction records for the products. All records must match before the inventory period is considered to be *reconciled*.

Managing Sample Inventory

For step-by-step procedures for managing sample inventory, see:

- Calculating a Running Total of the Sample Inventory (on page 544)
- Acknowledging Receipt of the Sample Inventory (on page 545)

- Process of Reconciling the Inventory (on page 545)
- Adding Sample Inventory to an Inventory Period (on page 538)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related, sample inventory information:

- Sample Inventory (on page 543)
- Sample Inventory Fields (on page 546)

Calculating a Running Total of the Sample Inventory

At the beginning of an inventory period, a sales representative can have *quantity n* of *product x*. During the inventory period, the sales representative performs various transaction tasks (for example: transfers in, transfers out, sample drops, adjustments, and acknowledgements). As each transaction task is started and completed, Oracle CRM On Demand updates the running count for product x.

Based on the sample transaction activity, Oracle CRM On Demand keeps a record of the current count for all products by calculating the *representative inventory balance*. To calculate the representative inventory balance, Oracle CRM On Demand takes the quantity of product x at the beginning of each inventory period and does the following:

- Adds shipment acknowledgements
- Adds sample transactions of the type, Transfer In
- Subtracts sample transactions of the type, Transfer Out
- Subtracts sample transactions of the type, Disbursement (a drop sample transaction)
- Subtracts sample transactions of the type, Return
- Adds or subtracts sample transactions depending on the type of Inventory Adjustment and the value in the quantity field. A negative number is acceptable to indicate a loss, theft, or human error.

Before you begin. To view the running count of the sample inventory, the System Count field must be displayed on the Sample Inventory Detail and Sample Inventory Edit page. By default, the System Count field is not displayed, so contact your samples administrator to configure the field setup for sample inventory pages. For more information about field management, see Record Type Application Customization Page (on page 1199).

To view the quantity at last physical count

1. On the Inventory Period List page, drill down on the Start Date field to open the inventory period record that you want.
2. On the Inventory Period Detail page, go to the Sample Inventory section.

   For each Sample Inventory line item, the value in the Last Physical Count field shows the quantity of the inventory at the time that the last inventory audit report was run. The System Count field shows the initial sample quantity that was transferred by headquarters to the sales representative. For more information about the fields on this page, see Sample Inventory Fields (on page 546).

Acknowledging Receipt of the Sample Inventory

When the samples administrator sends samples to end users in the field, when end users exchange samples, or when end users return samples to headquarters, the recipient of the transaction must acknowledge receipt of the sample inventory. The recipient must physically receive the sample inventory, count it, and acknowledge the quantity. This step is the starting point for tracking sample inventory and ultimately results in reconciling sample inventory at the end of the period.

Oracle CRM On Demand Samples Management supports the electronic movement of sample inventory through the process of Creating a Samples Transfer (on page 553). Samples are routed to a recipient who must then acknowledge receipt of the samples before Oracle CRM On Demand can transfer the new inventory to the recipient's active inventory period.

End users can acknowledge full or partial receipt of a samples transfer. For more information, see the following:

- Acknowledging Full Receipt of a Samples Transfer (on page 554)
- Acknowledging Partial Receipt of a Samples Transfer (on page 554)

Before you begin. To acknowledge receipt of the sample inventory, your user role must include the Enable Basic Samples Operations privilege.

NOTE: When acknowledging receipt of the sample inventory, if the end user does not already have records corresponding to the sample product, sample lot, or inventory period associated with the sample inventory being transferred, then Oracle CRM On Demand creates these records.

Process of Reconciling the Inventory

This topic describes how to reconcile the inventory.

Before you begin. Do the following:

- Your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.
- Meet the following requirements:
  - **Verify that previous inventory periods are reconciled.** Users must reconcile previous inventory periods in chronological order. This requirement is a concern only if a company's configuration allows more than one inactive, unreconciled period.
  - **Acknowledge the receipt of inventory transfers.** Users must send acknowledgements for all received sample inventory shipments.
  - **Create transfer transactions for transferred samples.** Users must create transfer transactions for any samples transferred to another representative or returned to headquarters.
  - **Mobile users must synchronize with the server database.** Mobile users must synchronize their local database with the server database before submitting an inventory count. This requirement is important if they are recording samples received in a previous period.

Restrictions That Apply When Reconciling the Inventory

Note the following restrictions:

- The counts for transferred and received samples are not reflected in the inventory count until their records have been submitted.
- An inventory period cannot be reconciled if any discrepancy exists between physical counts of the inventory and electronic counts of the inventory. If a discrepancy exists, it must be corrected before a user can reconcile the period.

To reconcile the inventory, perform the following tasks:

1 Closing Out an Inventory Period (on page 541)
2 Correcting Physical and Electronic Count Discrepancies (on page 558)
3 Reconciling an Inventory Period (on page 541)

Sample Inventory Fields

Use the Sample Inventory Edit page to add a new sample inventory record to an inventory period, or update details for an existing, sample inventory record. The Sample Inventory Edit page shows the complete set of fields for a sample inventory.

TIP: You can also edit a sample inventory on the Sample Inventory List page and the Sample Inventory Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the sample inventory fields.

Field	Description
Sample	The product associated with this sample inventory record. **NOTE:** When creating a new sample inventory record, only products that are categorized as samples (that is, products of category type Samples Dropped) can be entered in this field.
Lot #	The lot number associated with the sample product selected. This field is optional. **NOTE:** When adding or updating a sample inventory record, click the Lookup icon to select a sample lot. Only sample lots that are being tracked by lot number in the inventory (that is, sample lots that have the Inventory by Lot check box selected) are available for selection. For more information about sample lots, see Sample Lots (on page 593) and Sample Lot Fields (on page 595).
Opening Balance	The initial quantity received from headquarters at the beginning of the inventory period.
Last Physical Count	The quantity of inventory at the time that the latest inventory audit report was run.
Physical Count	A physical count of the balance on hand. The sales representative enters this value. **NOTE:** This is the only field that the sales representative can modify.
System Count	The initial quantity transferred by headquarters to the sales representative. For more information about viewing a running count of the sample inventory, see Calculating a Running Total of the Sample Inventory (on page 544). **NOTE:** By default, the System Count field is not displayed on the Sample Inventory Detail page and Sample Inventory Edit page, so contact your samples administrator to configure the field setup for sample inventory pages.

Field	Description
Difference	The difference between the value in the Physical Count field and the value in the Last Physical Count field. Oracle CRM On Demand automatically populates this field whenever an inventory period is closed out. For more information see, Closing Out an Inventory Period (on page 541).
Lot #: Expiration Date	The date on which the sample is set to expire. This date is relevant if using a sample lot to track sample inventory records.
Lot #: CutOff Date	A calculated date upon which the sample will expire. The formula to calculate the lot number cutoff date is as follows: Expiration Date minus the number of Short Days equals the CutOff Date.
Created	The date, timestamp, and user who created this sample inventory record.
Modified	The date, timestamp, and user who last modified this sample inventory record.

Related Information

See the following topics for related information about sample inventories:

- Sample Inventory (on page 543)
- Managing Sample Inventory (on page 543)
- Adding Sample Inventory to an Inventory Period (on page 538)

Inventory Audit Report

Use the Inventory Audit Report pages to create and track inventory audit reports.

An *inventory audit report* is generated by Oracle CRM On Demand when a sales representative creates an interim or final audit count for the inventory period. Administrators and sales representatives can view previously submitted inventory counts (interim and final close-out periods) on the Inventory Audit Report List page.

The inventory audit report is a useful tool for sample compliance administrators to check that samples are being distributed appropriately by individual sales representatives. Inventory audit reports allow compliance administrators to meet certain regulatory requirements during the year. When the inventory audit report has been created you cannot change it.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking inventory audit report information, the Inventory Audit Report tab might be excluded from your setup.

Managing Inventory Audit Reports

For step-by-step procedures for managing inventory audit reports, see:

- Requesting an Interim Inventory Count (on page 540). An interim audit count is a request to count the inventory and generate an inventory audit report.
- Closing Out an Inventory Period (on page 541). End users must count and log the final physical count for each sample and submit the final audit report. Closing out an inventory period automatically triggers the creation of the final inventory audit report.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Attaching Files to Records through Attachment Fields (on page 167)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about inventory audit reports:

- Inventory Audit Report (on page 547)
- Inventory Audit Report Fields (on page 548)
- Creating an Inventory Audit Report for an Inventory Period (on page 539)

Inventory Audit Report Fields

Use the Inventory Audit Report List page to view inventory audit report records. After an inventory audit report has been created or generated, you cannot modify or change it.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some of the inventory audit report fields.

Field	Description
Key Inventory Audit Report Information	
Type	The type of inventory audit report, which can be one of the following: ■ **Closeout Inventory Count.** This type of inventory audit report closes out an inventory period by counting and logging the final physical count for each sample. You can close out only active inventory periods (for more information, see Closing Out an Inventory Period (on page 541)). ■ **Interim Inventory Count.** This type of inventory audit report counts your physical inventory at any time during the active, unreconciled inventory period. Only active inventory periods are considered when you request an interim inventory count (for more information, see Requesting an Interim Inventory Count (on page 540)).
Status	The status of the inventory audit report describes the state of the record and can be one of the following: ■ **In Progress.** The initial state of an inventory audit report. ■ **Submitted.** The inventory audit report has been reviewed by the sales representative and submitted to his or her manager for approval. ■ **Rejected.** The inventory audit report was reviewed by the sales representative's manager and has been rejected as incomplete or inaccurate.

Field	Description
	■ **Approved.** The inventory audit report was reviewed by the sales representative's manager and was accepted as a valid accounting of inventory. ■ **Cancelled.** The inventory audit report did not follow the approval process and was cancelled.
Reason	The reason the inventory audit report is required, which can be one of the following: ■ **Annual.** Select this option if you are generating a standard interim inventory count for the past year. ■ **Annual - Close Out.** Select this option if you are generating the standard closeout inventory count for the year. ■ **For Cause.** Select this option if you are generating an ad hoc interim inventory count as requested by the samples administrator. ■ **For Cause - Close Out.** Select this option if the samples administrator requests that you generate a closeout inventory count outside of the expected inventory period. ■ **Special - Interim.** Select this option if the samples administrator requests that you generate an ad hoc inventory audit report. ■ **Weekly - Interim.** Select this option if you are generating an interim inventory count for the past week. ■ **Monthly - Interim.** Select this option this option if you are generating an interim inventory count for the past month. ■ **Termination - Close Out.** Select this option if the sales representative has been terminated and a separate party is counting the remaining inventory.
Comments	Additional comments entered about the inventory audit report.
Reported Date	The date that the report was generated.
Completed Date	The date that the report received final approval.
Attachment	If this field is exposed on the page, you can attach a file to the inventory audit report. The field initially shows a paper clip icon on the record Edit page:  You can attach a file to the inventory audit report by clicking the paper clip icon on the record Edit page and then selecting the file that you want to upload. After the file is uploaded and the record is saved, the Attachment field on the record Detail page shows the name and size of the attachment file. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file. You can attach only one file to each inventory audit report record. For instructions on attaching files to records through the Attachment field, and information about the restrictions on file sizes and file types, see Attaching Files to Records through Attachment Fields (on page 167).
Key Inventory Period Information	

Field	Description
Inventory Period	The inventory period that the audit report is associated with.
Owner	The sales representative who runs the inventory audit report and who owns the inventory records.
Created	The user, date, and timestamp when the report was generated.
Modified	The user, date, and timestamp when the report was approved or rejected.

Related Topics

See the following topics for related information about inventory audit reports:

- Inventory Audit Report (on page 547)
- Managing Inventory Audit Reports (on page 547)
- Creating an Inventory Audit Report for an Inventory Period (on page 539)

Sample Transactions

Use the Sample Transaction pages to create, update, and track sample transactions and associated transaction items for samples.

A *sample transaction* is a record for a sample transfer, receipt, sample drop, or inventory adjustment. Oracle CRM On Demand assigns each sample transaction record a unique identifier for tracking purposes. You create a sample transaction so that all movement of samples and promotional items can be reported and reconciled at the end of an inventory period, and a running count of inventory products can be maintained during an inventory period. Each sample transaction record represents a single transaction that can consist of one or more line item entries (transaction items). Transactions are associated with the appropriate inventory period depending on their transaction date. All sample drop and promotional item drop activity generates a disbursement transaction (drop sample transaction). Transferring inventory to and from headquarters and sales representatives generates two transaction records:

- One for the *transfer out* for the sending entity
- One for the *transfer in* for the entity that receives the sample

Sales representatives or headquarters can create adjustment transactions to account for discrepancies in inventory due to loss, theft, returns, found, or human error. When sample transactions have a status of Submitted, no changes can be made to the transaction information. If a change is required, you must generate a new transaction adjustment.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking sample transaction information, the Sample Transaction tab might be excluded from your setup.

Working with the Sample Transaction Homepage

The Sample Transaction Homepage is the starting point for managing sample transactions.

NOTE: Your company administrator can customize the layout of your Sample Transaction Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Before you begin. To work with sample transactions, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

Creating a Sample Transaction

You can create a new sample transaction by clicking the New button in the Recently Modified Sample Transactions section. For more information, see Creating Records (on page 51) and Sample Transaction Fields (on page 579).

You can create the following types of sample transactions:

- **Sent transactions.** For more information, see Creating a Samples Transfer (on page 553).
- **Adjustment transactions.** For more information, see Adjusting Sample Transactions (on page 555).
- **Lost and found transactions.** For more information, see Creating Lost and Found Sample Transactions (on page 556).

You cannot create the following types of sample transactions because Oracle CRM On Demand generates them automatically whenever sales representatives drop samples during sales calls:

- **Disbursement transactions.** You can view disbursement transactions. If changes are required for a disbursement transaction, you must create a new inventory adjustment transaction. For more information, see Viewing Disbursement Transactions (on page 557).
- **Received transactions.** End users must acknowledge the receipt of samples. If a sales representative receives a quantity of samples that was different from the quantity sent to her, an inventory adjustment transaction must be created to record the discrepancy. For more information, see Acknowledging Receipt of the Sample Inventory (on page 545).

Working with Sample Transaction Lists

The Sample Transaction List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for sample transactions.

Sample Transaction List	Filters
All Sample Transactions	All sample transactions to which you have visibility, regardless of who owns the sample transaction.
Adjustment Transactions	All sample transactions with your name in the Owner field that are of the type, Inventory Adjustment.
Disbursement Transactions	All sample transactions with your name in the Owner field that are of the type, Disbursement.
Discrepancy Transactions	All sample transactions with your name in the Owner field that have a status of Processed with Discrepancy.
Lost Transactions	All sample transactions with your name in the Owner field that are of the type, Inventory Adjustment, with a reason of Lost.
Received Transactions	All sample transactions with your name in the Owner field that are of the type, Transfer In.
Recently Modified Sample Transactions	All sample transactions with your name in the Owner field, sorted by the modified date.

Sample Transaction List	Filters
Sent Transactions	All sample transactions with your name in the Owner field that are of the type, Transfer Out.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Sample Transactions

The Recently Modified Sample Transactions section shows the sample transactions most recently modified. Click the Show Full List link to expand the list.

Adding Sections to Your Sample Transaction Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Sample Transaction Homepage:

- Recently Created Sample Transactions
- Recently Modified Sample Transactions
- My Recently Created Sample Transactions
- My Recently Modified Sample Transactions

To add sections to your Sample Transaction Homepage

1. On the Sample Transaction Homepage, click Edit Layout.
2. On the Sample Transaction Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Related Topics

See the following topics for related information about sample transactions:

- Sample Transactions (on page 550)
- Sample Transaction Fields (on page 579)
- Managing Sample Transactions (on page 552)

Managing Sample Transactions

For step-by-step procedures for managing sample transactions, see:

- Creating a Samples Transfer (on page 553)
- Acknowledging Full Receipt of a Samples Transfer (on page 554)
- Acknowledging Partial Receipt of a Samples Transfer (on page 554)
- Adjusting Sample Transactions (on page 555)
- Creating Lost and Found Sample Transactions (on page 556)
- Viewing Disbursement Transactions (on page 557)
- Adding Transaction Items to a Sample Transaction (on page 557)
- Correcting Physical and Electronic Count Discrepancies (on page 558)
- Dropping Samples During a Sales Call (on page 558)

For step-by-step procedures that are common to many record types, see:

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

Creating a Samples Transfer

A *samples transfer* is a sent transaction of the type Transfer Out. You create a samples transfer whenever product samples are exchanged within your company. This procedure can be used by:

- A samples administrator to send shipments to end users in the field
- End users to exchange samples between themselves
- End users to send samples to headquarters

After a samples transfer has been submitted in Oracle CRM On Demand, the recipient receives a samples transfer of type Transfer In. After the recipient acknowledges the receipt of the transaction, Oracle CRM On Demand enters the new inventory in the inventory count and decreases the inventory items from the sender's inventory records.

Before you begin. To create a samples transfer, your user role must include the Enable Basic Samples Operations privilege.

To create a samples transfer

1. On the Sample Transaction List page, click New.
2. On the Sample Transaction Edit page, set Transaction Type to Transfer Out.

   Transfer Out indicates that you are transferring samples to another user.
3. Set the status to In Progress.
4. Enter the name of the person who will receive the sample in the Transfer To field.
5. Complete the remaining fields on the Sample Transaction Edit page as required (see Sample Transaction Fields (on page 579) for more information), and then click Save.
6. Add at least one transaction item line item, as described in Adding Transaction Items to a Sample Transaction (on page 557).

7 Add or modify the books associated with the record as required.

8 Click Submit.

If there are no errors, the status of this new transfer out transaction record changes to In Transit, and Oracle CRM On Demand automatically creates a new recipient transaction record where the transaction type is Transfer In and the status is In Transit.

Any book information associated with the transfer out transaction is copied to the new recipient transaction.

The new received transaction record inherits all the transaction item line items from the transfer out transaction record.

Acknowledging Full Receipt of a Samples Transfer

Oracle CRM On Demand supports the electronic movement of sample inventory. For more information, see Creating a Samples Transfer (on page 553). Samples are routed to a recipient who must then acknowledge receipt of the samples before Oracle CRM On Demand can transfer the new inventory into the recipient's active inventory period.

End users can acknowledge full receipt of a samples transfer as described in the following procedure, or partial receipt of a samples transfer as described in Acknowledging Partial Receipt of a Samples Transfer (on page 554).

When acknowledging receipt of a samples transfer, if the end user does not already have records corresponding to the sample product, sample lot, or inventory period associated with the sample inventory being transferred, then Oracle CRM On Demand creates these records accordingly.

Before you begin. To acknowledge receipt of a samples transfer, your user role must include the Enable Basic Samples Operations privilege.

To acknowledge full receipt of a samples transfer

1 On the Sample Transaction Homepage, click Received Transactions in the Sample Transaction List section.

2 On the Sample Transaction List page, drill down on the Name field to open the transaction that you want to acknowledge.

The transaction that you open must be of type Transfer In and have a status of In Transit.

3 Review the details of the transaction, and in the Transaction Items section, enter values in the Received Quantity fields to reflect the quantity of sample products received.

The Shipped Qty field shows the quantity of items shipped and is a read-only field.

4 Click Acknowledge.

If there is no difference between the received and shipped quantities, then the status of the transaction changes to Processed, and you have acknowledged full receipt of the samples transfer.

If there is a difference between the received and shipped quantities, then you have the option to either close the transaction with a discrepancy, or keep the transaction open with a status of Partially Received. For more information, see Acknowledging Partial Receipt of a Samples Transfer (on page 554).

NOTE: The quantities of samples transferred do not appear in end users inventory counts until they acknowledge receipt of the samples.

Acknowledging Partial Receipt of a Samples Transfer

Oracle CRM On Demand supports the electronic movement of sample inventory. For more information, see Creating a Samples Transfer (on page 553). Samples are routed to a recipient who must then acknowledge receipt of the samples before Oracle CRM On Demand can transfer the new inventory to the recipient's active inventory period.

End users can acknowledge full receipt of a samples transfer as described in Acknowledging Full Receipt of a Samples Transfer (on page 554), or partial receipt of a samples transfer as described in the following procedure.

When acknowledging receipt of a samples transfer, if the end user does not already have records corresponding to the sample product, sample lot, or inventory period associated with the sample inventory being transferred, then Oracle CRM On Demand creates these records accordingly.

Before you begin. To acknowledge receipt of a samples transfer, your user role must include the Enable Basic Samples Operations privilege.

To acknowledge partial receipt of a samples transfer

1. On the Sample Transaction Homepage, click Received Transactions in the Sample Transaction List section.
2. On the Sample Transaction List page, drill down on the Name field to open the transaction that you want to acknowledge.

   The transaction that you open must be of the type Transfer In and have a status of In Transit.
3. Review the details of the transaction, and in the Transaction Items section, enter values in the Received Quantity fields to reflect the quantity of sample products received.

   The Shipped Qty fields shows the quantity of items shipped and is a read-only field.
4. Click Acknowledge.

   If there is a difference between the received and shipped quantities, then a discrepancy transaction is automatically generated by Oracle CRM On Demand with a status of Processed with Discrepancy. If there is no difference between the received and shipped quantities, then Oracle CRM On Demand changes the status of the transaction to Processed, and you have acknowledged full receipt of the samples transfer.

NOTE: The samples transfer quantities do not appear in end users inventory counts until they acknowledge receipt of the samples.

Adjusting Sample Transactions

Sales representatives must track inventory and make sure that each sample is accounted for during the reconciliation. The adjustment feature allows samples administrators and end users to adjust inventory counts of samples by adjusting past, sample transactions (transactions that have already been processed). Common reasons for adjusting past, sample transactions include: product loss, product thefts, counting errors, or data entry errors. You can add products or adjust quantities for any type of sample transaction (transfer, lost, stolen, received, drop sample transaction or disbursement, and so on). You use adjustments to reconcile the original quantity from the samples administrator record with the quantity that exists when the sales representative counts the physical inventory.

You can adjust any transaction of any type that has a transaction status of Processed. After an existing transaction has been processed, you cannot adjust it again. You must create a new inventory adjustment record. For more information, see the following topics:

- Adjusting an Existing Inventory Adjustment Record (on page 555)
- Creating a New Inventory Adjustment Record (on page 556)

Before you begin. To create adjustments (sample transactions of the type, Inventory Adjustment), your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

Adjusting an Existing Inventory Adjustment Record

You can adjust any transaction of any type that has a transaction status of Processed. After an existing transaction has been processed, you cannot adjust it again. You must create a new adjustment record, see Creating a New Inventory Adjustment Record (on page 556).

Before you begin. To adjust existing inventory adjustment records, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

To adjust an existing inventory adjustment record

1. On the Sample Transaction List page, open a transaction of type Inventory Adjustment with a transaction status of Processed.
2. Add or modify the books associated with the record, as required.
3. Click Adjust.

   This step creates a new transaction of type Inventory Adjustment with a status of In Progress.

   All transaction item line items are copied to the new record. Any book information associated with the original transaction is copied to the new transaction.
4. Modify the key transaction information, as required.

   For more information about the fields in this section of the page, see Sample Transaction Fields (on page 579).
5. Modify the transaction items, as required.

   For example, you can modify the quantity for an existing transaction item line item, add a new transaction item line item, or delete an existing transaction item line item. For more information about the fields in this section of the page, see Transaction Item Fields (on page 583).
6. Click Submit to submit the new inventory adjustment transaction record.

   If there are no errors, the status of the new inventory transaction record changes to Submitted.

Creating a New Inventory Adjustment Record

To resolve discrepancies between physical counts of the inventory and electronic counts of the inventory, end users and samples administrators must create and submit adjustment transactions. Sales representatives and samples administrators record changes to their sample transactions by creating new sample transaction records of the type, Inventory Adjustment.

Before you begin. To create inventory adjustment records, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

To create a new inventory adjustment record

1. On the Sample Transaction List page, click New.
2. On the Sample Transaction Edit page, set Transaction Type to Inventory Adjustment.
3. Enter a reason in the Reason field, for example, Lost samples, Found samples, or Initial Count.
4. Complete the remaining fields on the Sample Transaction Edit page as required, and then click Save.

   For more information about the fields on this page, see Sample Transaction Fields (on page 579).
5. Add at least one transaction item line item, as described in Adding Transaction Items to a Sample Transaction (on page 557).
6. Click Submit.

Creating Lost and Found Sample Transactions

Sales representatives can record any lost or found sample transactions that they notice in their inventory by creating new lost and found sample transaction records.

Before you begin. To create lost and found sample transactions, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

To create a new lost or found sample transaction record

1. On the Sample Transaction List page, click New.

2 On the Sample Transaction Edit page, set Transaction Type to Inventory Adjustment.
3 Enter a reason in the Reason field, for example: Lost or Found.
4 Complete the remaining fields on the Sample Transaction Edit page as required, and then click Save.
For more information about the fields on this page, see Sample Transaction Fields (on page 579).
5 Add at least one Transaction Item line item.
For more information, see Adding Transaction Items to a Sample Transaction (on page 557).
6 Click Submit.

Viewing Disbursement Transactions

End users cannot create disbursement transactions (drop sample transactions). Oracle CRM On Demand automatically generates disbursement transactions whenever sales representatives drop samples during sales calls.

NOTE: End users cannot create received transactions either. Oracle CRM On Demand automatically generates transfer in transactions whenever sales representatives return previously dropped samples or transfer out samples to headquarters or another sales representative.

Before you begin. To view disbursement transactions, your user role must include the Enable Basic Samples Operations privilege.

To view disbursement transactions

1 On the Sample Transaction Homepage, click Disbursement Transactions in the Sample Transaction List section.
2 On the Sample Transaction List page, drill down on the Name field to open the disbursement transaction that you want to view.
3 On the Sample Transaction Detail page that is displayed, review Key Transaction Information, Key Contact Information, and Transaction Items information.
For more information about the fields on this page, see Sample Transaction Fields (on page 579).
End users cannot update or change any of the information on this page. If any modifications or corrections are required for a disbursement transaction, a new inventory adjustment transaction must be created, see Creating a New Inventory Adjustment Record (on page 556).

NOTE: In a similar way, you can also view received transactions by selecting the appropriate option from the Sample Transaction List.

Adding Transaction Items to a Sample Transaction

Use the Sample Transaction Edit page to add a transaction item line item to a sample transaction, or update the details for an existing transaction item line item in a sample transaction.

Before you begin. To add transaction items to sample transactions, your user role must include the Enable Basic Samples Operations privilege.

To add a transaction item to a sample transaction

1 On the Sample Transaction List page, drill down on the Name field to open the transaction record that you want.
2 On the Sample Transaction Detail page, click New in the Transaction Items section.
3 On the Transaction Item Edit page, complete the required fields. Click Save.
For more information about the fields on this page, see Transaction Item Fields (on page 583).

Related Topics

See the following topics for related information about transaction items:

- Transaction Items (on page 582)
- Managing Transaction Items (on page 582)
- Transaction Item Fields (on page 583)

Correcting Physical and Electronic Count Discrepancies

To correct discrepancies between physical counts of the inventory and electronic counts of the inventory (as recorded by Oracle CRM On Demand when samples were transferred), samples administrators and end users must create and submit adjustment transactions.

Correcting physical and electronic count discrepancies is also an important step in Process of Reconciling the Inventory (on page 545).

Before you begin. To correct discrepancies between physical counts of the inventory and electronic counts of the inventory, your user role must include the Enable Basic Samples Operations privilege and the Enable Samples Adjustment privilege.

Samples administrators and sales representatives can use one or all of the following options to correct discrepancies between physical counts of the inventory and electronic counts of the inventory:

- Creating and submitting a sample adjustment transaction with one or more line items. For more information, see Creating a New Inventory Adjustment Record (on page 556).
- Adjusting the line item records of previously entered transactions that have not yet been submitted. For more information, see Adjusting an Existing Inventory Adjustment Record (on page 555).

Dropping Samples During a Sales Call

During a sales call, sales representatives take samples from their inventory and drop them to physicians, pharmacists, clinics, hospitals, and other appropriate contacts. The sales representative must do the following:

- Count each sample that was dropped.
- Verify that the sample is appropriate for the physician and his or her specialty.
- Capture authorized signatures to complete the transaction.

Product Requirements for Linking Products to a Call Record. Only products of the category type Samples Dropped, Promotional Item Dropped, Products Detailed, or Sample Request Item that meet the following conditions can be linked to a call record:

- The products are not blocked for the primary contact for the sales call. During a sales call, the sales representative cannot provide any products that are blocked for the primary contact on the call, including any blocked product information, sample, or promotional item products. A product might be blocked for a contact for corporate, regulatory, or legal reasons. For example, a pharmaceutical company might want to prevent the disclosure of the details of a test drug. For information about blocking products for contacts, see Blocked Products (on page 643).

  NOTE: If a product is blocked for the primary contact on a sales call, then the sales representative cannot link the product to the call record, even if the sales representative has an allocation for that product. Products that are blocked for the primary contact on a call are not available for selection in the list of products that can be added to the call. If no primary contact exists for the call, then no products are blocked.

- The products have been allocated to the sales representative.
- The products are present in the sales representative's inventory in the case of samples and promotional items.
- The products are active on the current call date.

Guidelines for Setting Up Sales Call. Consider the following guidelines when setting up sales calls for dropping samples or promotional items, or detailing products:

- Make sure that all attendee or contact calls have an associated primary contact.
- Make sure that all attendee, contact, or account calls have an associated address.
- Do not alter the primary contact information after the call record is created and has an associated sample drop, promotional item, product detail, or sample request defined.

Before you begin. To drop off samples, request samples, and distribute promotional items during a sales call, your user role must include the Enable Basic Samples Operations privilege.

To drop samples during a sales call

1. On the Contacts Homepage, open the contact to whom you want to drop samples.
2. On the Contact Detail page in the Calls section, click New Call or Auto Call to add a new line item.
   - Clicking New Call brings you to the Call Edit page where you must enter most information manually for the new call record.

     Make sure that you specify Call in the Type field. Otherwise, the following related items will not be available to you: Samples Dropped, Promotional Items, Products Detailed.
   - Clicking Auto Call brings you to the Call Detail page where the following field data is filled automatically in for the new call record.
     - The Status field has a value of Planned.
     - The End Date field has a value equal to the Start Date plus 30 minutes.
     - The Type field has a value of Call.
3. On the Call Edit or Call Detail page, do the following:
   a. To populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.
   b. Enter or update the information.

      For more information about the fields on the Call Edit and Call Detail page, see Tracking Visits (Sales Calls) to Customers (on page 208).
4. Save the record by doing one of the following:
   - On the Call Edit page, click Save.
   - On the Call Detail page, click either Save as a Private Smart Call or Save as a Public Smart Call.

   For more information, see Saving Call Detail Information as a Template (on page 573).
5. Next, do one of the following on the Call Detail page as required:
   - Add products detailed, samples dropped, sample request, or promotional item line items to the parent call record.

     NOTE: Only products that are not blocked for the primary contact for the call can be added to the parent call record. Products that are blocked for the primary contact are not available for selection on the product list.
   - Add an attendee line item to the parent call record, then add products detailed, samples dropped, sample request, or promotional item line items to the attendee record.

   For more information about these tasks, see the following topics:

   - Adding Attendees to Calls (on page 560)
   - Adding Multiple Contacts to Account Calls (on page 561)
   - Linking Product Detailed Information to Calls (on page 563)
   - Linking Samples Dropped Information to Calls (on page 566)

- Linking Promotional Item Information to Calls (on page 568)
- Linking Sample Request Information to Calls (on page 570)

6 When ready, click Submit to submit the call detail information for processing.

For information, see Submitting Call Detail Information for Inventory Tracking.

Related Topics

See the following topics for related information about sample drops:

- Managing Allocations (on page 587)
- Tracking Visits (Sales Calls) to Customers (on page 208)
- Setting the Maximum Number of Times Contacts Can be Sampled (see Setting the Maximum Number of Times Contacts Can be Sampled Without a Valid State License on page 1879)
- Authorizing Contacts to Receive Samples (see Authorizing Contacts to Receive Samples on page 1880)

Adding Attendees to Calls

An *attendee* is an individual who is present on a given occasion for a meeting or phone call. An account call can have multiple attendees, and each individual attending an account call can have different unique items or specific interactions that the sales representative will record. Reporting at an individual-interaction level allows the sales representative to record what sample or promotional item was dropped off and which products detailed or sample request information was recorded for each individual interaction.

An *attendee call* is an individual call that is associated with a parent account call. Attendee calls operate like professional calls, except that they are linked to account calls. Attendee calls are separate records with a call type of Attendee Call.

Access Profile Settings for Attendee Calls

To access and add attendees to a parent account, you must have the appropriate settings in your access profiles. The following table shows the access level setting for the Attendee Call related information record type that allows you to access attendee calls on a parent account. The setting is required on both your default access profile and your owner access profile. When the access level is configured for the Attendee Call related information record type, attendee calls will behave similarly to other calls (account or contact calls) within the call framework. Top level permission for attendee calls, however, is restricted to the permission defined on the parent activity. For more information about access profiles, see Access Profile Management (on page 1403) and Process of Setting Up Access Profiles (on page 1416).

Record Type	Related Information Record Type	Access Level
Activity	Attendee Calls	View

NOTE: Attendee calls are grandchildren of account and the child of Account Call (which is a type of Activity). As a result, access to attendee calls must be configured from the Activity record type related information section.

The following procedure describes how to add an attendee to a call.

To add an attendee to a call

1 Go to the Accounts Homepage, and select the account that you want.

For information on selecting records, see Finding Records (on page 74).

2 On the Account Detail, scroll down to the Calls section, and open the account call record for which you want to add an attendee.

3 On the Call Detail page, click New Call in the Attendees section.

NOTE: If the Attendees section is not visible on your Details page, click the Edit Layout link in the upper-right corner of the page, and add the Attendees section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

4. On the Attendee Detail page, do the following:
   a. To populate the new call record with information from an existing smart call template, click the Lookup icon next to the Smart Call field, and select the smart call.
   b. Enter or update the information as required. However, note the following:
      - The value in the Call Type field, which is read-only, is Attendee Call by default.
      - The Account information is populated from the account call.
      - The Address information is populated from the account call.
      - You must use the Primary Contact field to select the contact who is attending the account call.

      For more information about the fields on this page, see Tracking Visits (Sales Calls) to Customers (on page 208).

      NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help. Custom fields that your company administrator defined are saved in the Smart Call template.
5. Click Save to save the attendee record.
6. On the Attendee Detail page, enter any products detailed, samples dropped, sample request, and promotional item information for this attendee record as shown in the following topics:
   - Linking Product Detailed Information to Calls (on page 563)
   - Linking Samples Dropped Information to Calls (on page 566)
   - Linking Promotional Items Information to Calls (see Linking Promotional Item Information to Calls on page 568)
   - Linking Sample Request Information to Calls (on page 570)

   NOTE: Only products that are not blocked for the primary contact for the call can be added to the Attendee Detail page. Products that are blocked for the primary contact are not available for selection on the product list.
7. When done, click Back to Call Detail.

   The Attendees section lists the newly added attendee.
8. When ready, click Submit to submit the call detail information for processing.

   For more information, see Submitting Call Detail Information for Inventory Tracking.

Adding Multiple Contacts to Account Calls

An account call can contain multiple contacts. You can automatically create an attendee call for each contact, using the Oracle CRM On Demand Generate Calls feature, which enables you to reduce the number of keystrokes when creating calls. This feature also provides consistent information for the Contacts and Attendee Calls related information sections of the account call.

Considerations Before Adding Multiple Contacts to an Account Call

Before you add multiple contacts to an account call, using this procedure, consider the following:

- The selected contacts are associated with the account call unless the contact has the Blocked Reason Code field set. If the contact has the Blocked Reason Code set, then the contact is not added to the account call nor is an attendee call generated, and Oracle CRM On Demand displays a message indicating that the contact is blocked. For more information on blocking contacts, see Blocking Contacts (on page 303).

- For each contact that is not blocked, Oracle CRM On Demand generates an attendee call when you select Generate Calls on the Account Call Detail page. The generated attendee calls are visible in the Attendee Call tab of the Account Call Detail page. The generated attendee calls have the Date, Time, Duration, Account, Address, Status, Subject fields populated from the parent account call.
- You can see the correlation between the attendee call and the contact list for the account call as follows:
  - If the contact is removed or deleted, then the attendee call is also removed or deleted.
  - If the attendee call is removed or deleted, then the contact is also removed or deleted, as long as the account call is not in the Signed, Submitted, or Completed status.
- If the contacts are merged within the account call UI flow, then Oracle CRM On Demand removes the attendee calls for the secondary contact.
- If you have provided products detailed information, using the Products Detailed related information section or the Available Products for Detailing related information section in the account call, then the individual attendee calls are populated with the same product detailed information when the calls are created using Generate Calls.
- If you have documented the samples dropped, promotional items dropped, or products detailed for a call, but if you have not submitted the call, and if a blocked product record is associated with the contact, then the call submission continues without error. The product must be blocked the first time that the sample or promotional item is dropped or the product detail is created so that the product is blocked from call reporting. If you have already entered the item in Oracle CRM On Demand and blocked the product, then call processing proceeds correctly. For more information on product blocking, see Blocked Products (on page 643).

Before you begin. The person performing this procedure, typically a company administrator or a field service representative, requires the Calls: Enable Call Detailing privilege and access to Account Call, Contact Call, and Attendee Call records in the access profiles.

To add multiple contacts to an account call

1. Go to the Accounts Homepage, and select the account that you want.

   For information on selecting records, see Finding Records.
2. On the Account Detail, scroll down to the Calls section, and open the account call record for which you want to add an attendee.
3. On the Account Call Detail page, click Add in the Contacts related information section, and from the Search for Contacts window, select the contacts that are participating in the call, and then click OK when you have finished selecting the contacts.

   NOTE: If the Contacts section is not visible on the Call Details page, click the Edit Layout link in the upper-right corner of the page, and add the Contacts section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.
4. On the Account Call Detail or any of the generated Attendee Call Detail pages, enter any products detailed, samples dropped, sample requests, and promotional item information as shown in the following topics:
   - Linking Product Detailed Information to Calls (on page 563)
   - Linking Samples Dropped Information to Calls (on page 566)
   - Linking Promotional Item Information to Calls (on page 568)
   - Linking Sample Request Information to Calls (on page 570)

   NOTE: You can add only products that are not blocked for the primary contact for the call to the Attendee Detail page. Products that are blocked for the primary contact are not available for selection on the product list.
5. When you are done, click Back to Call Detail.

   The Contacts section lists the newly added contacts.
6. When you are ready, click Submit to submit the call detail information for processing.

For more information, see Submitting Call Detail Information for Inventory Tracking.

Linking Product Detailed Information to Calls

You can link product detailed information to calls in one of the following ways:

- By adding products detailed information to a parent call
- By adding attendees to the parent call and then adding the products detailed information for each individual attendee record

  You add attendees to a parent account call so that the products detailed, samples dropped, sample request, and promotional item information can be tracked for each individual who attends the meeting.

For information on how to associate product detailed information with Structured Product Messaging (SPM) information, see Associating Call Objectives, Next Call Objectives, and Outcomes to Products Detailed in a Sales Call (on page 629).

This procedure describes how to link product detailed information to a call record.

Considerations When Choosing to Use the Available Products for Detailing Information Section or the Products Detailed Related Information Section

This topic describes the considerations when using the Available Products for Detailing information section or the Products Detailed information section to link product detailed information to calls:

- Available Products for Detailing Related Information Section

  Available Products for Detailing provides a list of products that the sales representative can detail to customers. The list is based on the sales representative's allocation records. Administrators can customize the Available Products for Detailing section to remove the Indication picklist, add the Product Indication record, add new fields, and use customized page layouts. In addition, administrators can include their own custom fields as with other Oracle CRM On Demand related information sections. In Release 24 and earlier releases, the Indication picklist was a required field along with the Priority field. This requirement no longer applies.

  NOTE: Messaging Plan objects that support Structured Product Messaging cannot be linked to Available Products for Detailing.

- Products Detailed Related Information Section

  If your company wants to document call objectives, next call objectives, and outcomes, then use the Products Detailed related information section instead of Available Products for Detailing.

  Products Detailed has historically provided a selection menu of all products of type Detail where the sales representatives could choose which products to include in the detailing session. It provides an administrative filter that allows a sales representative to only display the products allocated to the sales representative. The Products Detailed related information section is fully customizable because administrators can add new fields as required. Administrators can add the Product Indication record type to Products Detailed and replace the optional Indication picklist. Products Detailed also supports the Structured Product Messaging record types and information.

For more information, on customizing Oracle CRM On Demand, see Application Customization (on page 1198).

About Product Field Synchronization in Products Detailed, Messaging Plan Items, Messaging Plan Relations, and Message Response Records

The Product field in the Messaging Plan Item, Messaging Plan Item Relations, and Message Response related information records (related PCD records) must be associated with an available product from the parent Products Detailed record. When you associate a product in the related PCD records by using the Lookup selector, the selector lists only the products that are available in the parent Products Detailed record. However, after completing the association of the Product field in the Products Detailed record with the related PCD records, a user can subsequently change the parent product in the Products Detailed record. Consequently, the previously saved related PCD child records that have been enforced with the same product as in the Products Detailed record become out of synchronization. For this reason, do not update the Product field in a Products Detailed record after you have associated the product with the related PCD records.

About Process Administration Rules for Locking Activity Records and Call Product Detailed Records

Through Oracle CRM On Demand Process Administration, your administrator can create the following record locking rules:

- A rule to lock an Activity record along with its child records
- A rule to lock the Call Product Detailed record along with its child records

In this case, when you submit a Call Activity record, Oracle CRM On Demand synchronizes the status of the Call Product Detailed record and the status of the Call Activity record. When the Call Activity is marked as Submitted, Oracle CRM On Demand also marks the Products Detailed record as Submitted. If the Process Administration locking rule for Activity where the status is set to Submitted locks the Activity child records, then it is recommended that you also use a similar Process Administration locking rule for Call Product Detailed when its status is set to Submitted. For more information on setting up record locking rules for Oracle CRM On Demand Life Sciences Edition, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Important Consideration for Products Detailed Related Information Section Operations

Because of the unique nature of the Products Detailed functionality, always perform operations related to products detailed from the Products Detailed related information section in a Call Detail page. You can perform products detailed operations from the following locations:

- (Recommended) The Products Detailed related information section in a Call Detail page, which supports four operations: New, Edit, Inline Edit, and Delete. All four operations generate Integration Event Queue (IEQ) XML that includes the parent Activity record.
- (Not recommended) The Products Detailed Detail page, displayed by clicking Product Name in the Products Detailed related information section, supports three operations: Edit, Inline Edit, and Delete. All three operations generate IEQ XML that does not include the parent Activity record. If you perform such operations from the Products Detailed Detail page, then workflow actions that you have configured using these operations or other actions that depend on the generated IEQ XML might not behave as expected.

To link product detailed information to a call record

1. On the Call Detail or Attendee Detail page, scroll down to either the Available Products for Detailing section or the Products Detailed section, and do one of the following:

   NOTE: If the section that you want is not visible on your page, then click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.

   - In the Available Products for Detailing section, enter the required information in the Indication, Priority (optional), and Issues (optional) fields.

     Only products of category type Products Detailed that are not blocked for a primary contact, that have been allocated to the sales representative, and that are active on the current date are visible in the available products list to link to the call record.

     For information on the fields, see the table at the end of this topic.
   - In the Products Detailed section, click New, and enter the required information on the Product Detailed Edit page.

     For information on the fields, see the table at the end of this topic.

     NOTE: If your company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting, then only the products that are allocated to the sales representative appear in the

Product selector. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative (on page 1880).

NOTE: Product Detailed fields are copied to the new record when you create a new call record from a smart call template.

To access the Attendee Detail page, go to the Attendees section on the Call Detail page, and open the attendee record that you want.

2 Save the record.

3 Repeat steps 1-2 to add more product detailed line items to the call record.

4 When ready, click Submit to submit the call detail information for processing.

For information, see Submitting Call Detail Information for Inventory Tracking.

Field	Description
Key Product Detailed Information	
Product Category	(View only) The product category that the company administrator defines. For example, it can be one of the following: - Samples Dropped - Promotional Item Dropped - Products Detailed
Product	(Required) The name of the product (for example, a medical device), discussed or demonstrated to the customer. Select the item, using the Lookup selector. For information on setting up products, see Setting Up Company Products (on page 1855) and Product Fields (on page 584). Only products of the category type Samples Dropped, Promotional Item Dropped, Products Detailed, or Sample Request Item that meet the following conditions can be linked to a call record: - The products are not blocked for a primary contact. - The products have been allocated to the sales representative, and the company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative (on page 1880). - The products are active on the current call date.
Priority	Optional field for customer use.
Indication	The condition that the product addresses. Some examples are: Allergy, Asthma, Arrhythmia, Heart Failure, and so on. Use the drop-down list to select an indication. Before Release 23, the Indication field was a required field by default. However, for the current release, this field is no longer required. However, if your company has customized the page layout for the Product Detailed category in Release 23, then the Indication picklist field remains a required field for those customized layouts. To change this field to Not Required, your company administrator must deselect the Required check box for the field that was set up in the customized page layout for product details. For more information on field setup, see Creating and Editing Fields (on page 1219).

Field	Description
Issues	This field is optional field for customer use. Some examples include: Side Effects, Efficacy, Cost versus Generics, Price, and so on. Use the drop-down list to select an issue.
NOTE: The following fields are not available by default. However, your company administrator can add them to your Product Detail page layout. For more information, see Customizing Static Page Layouts (on page 1267).	
Detailed Product	This value is set to the same value as in the Product field. Changing this value by using the Lookup selector changes the Product field to the same value.
Primary Messaging Plan Item	The messaging plan item that is designated as the primary message for the detailed product.
Primary Messaging Plan Relations	The messaging plan item relations record that is designated as the primary for the detailed product.
Primary Message Response	The message response that is designated as the primary for the detailed product.
Type	The Product Detailed category. Use the picklist to choose the type. The default values for Type are Message Response, Outcome, Call Objective, and Next Call Objective. However, your company administrator can add additional types, if required. Selecting a type can result in a different page layout from the default page layout for the Products Detailed record type if your administrator has set up dynamic page layouts for this record type. For example, selecting Call Objective can result in a Call Objective page layout, if it is set up by your administrator. For more information on setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts (on page 1314) and also see the topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
Product Indication	A combination of a symptom or malady and the specific product or drug that alleviates the symptom or malady that is typically detailed by pharmaceutical sales representatives during a call with a health practitioner. For more information, see Product Indications (on page 633).
Detail Notes	Additional information about the product detailed. This field has a limit of 250 characters.

Linking Samples Dropped Information to Calls

You can link samples dropped information to calls in one of the following ways:

- By adding samples dropped information to a parent call
- By adding attendees to the parent call and then adding the samples dropped information for each individual attendee record

  You add attendees to a parent account call so that the products detailed, samples dropped, sample request, and promotional item information can be tracked for each individual who attends the meeting.

The following procedure describes how to link samples dropped information to a call record.

Before you begin. To drop off samples during a sales call, your user role must include the Enable Basic Samples Operations privilege.

To link samples dropped information to a call record

1 On the Call Detail or Attendee Detail page, scroll down to either the Available Samples for Drop section or the Samples Dropped section and do one of the following:

NOTE: If the section that you want is not visible on your page, click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

- In the Available Samples for Drop section, enter the required information in the Quantity field.

  Only products of category type Samples Dropped that are not blocked for a primary contact and that have been allocated to and are present in the sales representative's inventory are visible in the available samples list to link to the call record.
- In the Samples Dropped section, click New and enter the required information on the Samples Dropped Edit page.

  NOTE: If your company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting, then only the products that are allocated to the sales representative appear in the Product selector. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative (on page 1880).

NOTE: The samples dropped fields are copied to the new record when you create a new call record from a smart call template *except* for Lot number (#).

To access the Attendee Detail page, go to the Attendees section on the Call Detail page, and open the attendee record that you want.

The following table describes some of the fields.

Field	Description
Key Sample Dropped Information	
Product Category	(View only) The product category that the product administrator defined at the company. For example, it can be one of the following: ▪ Samples Dropped ▪ Promotional Item Dropped ▪ Products Detailed
Product	(Required) The name of the product sample (for example, a new drug on the market), dropped off to the contact. Select the item, using the Lookup selector. For information on setting up products, see Setting Up Company Products (on page 1855) and Product Fields (on page 584). Only products of the category type Samples Dropped, Promotional Item Dropped, Products Detailed, or Sample Request Item that meet the following conditions can be linked to a call record: ▪ The products are not blocked for a primary contact. ▪ The products have been allocated to the sales representative, and the company administrator has set the Enable Filtering of Product Selection by Sales Rep

Field	Description
	Allocation setting. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative (on page 1880). ■ The products are active on the current call date.
Lot #	The lot number for the sample product selected. **NOTE:** This field is relevant only if using lot numbers to track samples in the inventory. When adding or updating a sample drop record, only sample lots that have the Inventory by Lot check box selected can be entered in this field. For more information, see Sample Lots (on page 593) and Sample Lot Fields (on page 595).
Quantity	The number of sample items dropped off to the contact. The quantity must be a number from 1 to 9998. A warning message will appear if you do one of the following: ■ Enter a value that exceeds the value in the Max Per Call field. ■ Enter a value that exceeds or is within 10% of the maximum quantity of product allowed to drop off to a contact within the allocation period.
Max Per Call	(View only) The maximum quantity of product that you are allowed to drop off for a call.
Max Per Allocation	(View only) The maximum quantity of product that you are allowed to drop off within the allocation period.
Calculated Sum of Quantity Allocation	(View only) The total quantity of product dropped off so far during the allocation period.

1. Save the record.

   Provided that all of the following conditions are true when you click Save, then Oracle CRM On Demand generates a Disbursement transaction with a line item for each dropped sample for the call and submits the disbursement transaction to update the sample inventory. If the disbursement transaction is successful, then Oracle CRM On Demand changes the status of the call to Submitted.

   - All samples exist in the sample inventory for the period indicated by the date and time of the call.
   - The period in which the samples are recorded is an unreconciled period. An error message appears if it is a reconciled period.
   - A valid lot number is specified for dropped samples that are tracked by lot numbers.
   - The quantity value that you enter is not greater than the maximum quantity allowed to drop for a call.
   - The maximum quantity allowed to drop during the allocation period is not exceeded when you enter the quantity value.
2. Repeat steps 1-2 to add more sample dropped line items to the call record.
3. When ready, click Submit to submit the call detail information for processing.

   For information, see Submitting Call Detail Information for Inventory Tracking.

Linking Promotional Item Information to Calls

You can link promotional item information to calls in one of the following ways:

- By adding promotional item information to a parent call
- By adding attendees to a parent call and then adding the promotional item information for each individual attendee record

  You add attendees to a parent account call so that the products detailed, samples dropped, sample request, and promotional item information can be tracked for each individual who attends the meeting.

The following procedure describes how to link promotional items, educational items, or other marketing items to a call record.

Before you begin. To drop off promotional items during a sales call, your user role must include the Enable Basic Samples Operations privilege.

To link promotional items, educational items, or other marketing items to a call record

1 On the Call Detail or Attendee Detail page, scroll down to either the Available Promotional Items for Drop section or the Promotional Items section and do one of the following:

   NOTE: If the section that you want is not visible on your page, then click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.

   - In the Available Promotional Items for Drop section, enter the required information in the Quantity field.

     Only products of category type Promotional Item Dropped that are not blocked for a primary contact and that have been allocated to and are present in the sales representative's inventory are visible in the available promotional items list to link to the call record.

   - In the Promotional Items section, click New, and enter the required information on the Promotional Item Dropped Edit page.

     NOTE: If your company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting, then only the products that are allocated to the sales representative appear in the Product selector. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative (on page 1880).

   For information on the promotional item fields, see the table of field descriptions at the end of this procedure.

   To access the Attendee Detail page, go to the Attendees section on the Call Detail page, and open the attendee record that you want.

   NOTE: The Promotional Item fields are copied to the new record when you create a new call record from a smart call template.

2 Save the record.

   Provided that all of the following conditions are true when you click Save, then Oracle CRM On Demand generates a disbursement transaction with a line item for each sample promotional item dropped for the call, and it submits the disbursement transaction to update the sample inventory. If the disbursement transaction is successful, then Oracle CRM On Demand changes the status of the call to Submitted.

   - All sample promotional items exist in the sample inventory for the period indicated by the date and time for the call.
   - The period in which the sample promotional items are recorded is an unreconciled period. An error message appears if it is a reconciled period.
   - A valid lot number is specified for the dropped sample promotional items that are tracked by lot numbers.
   - The quantity value that you enter is not greater than the maximum quantity that you are allowed to drop for a call.
   - The maximum quantity that you are allowed to drop during the allocation period is not exceeded when you enter the quantity value.

3 Repeat steps 1-2 to add more promotional item line items to the call record.

4 When ready, click Submit to submit the call detail information for processing.

   For information, see Submitting Call Detail Information for Inventory Tracking.

Field	Description
Key Promotional Items Dropped Information	
Product	(Required) The name of the promotional item (for example, a pen or golf ball) or educational item (for example, a white paper or a manual), dropped off to the contact. Select the item, using the Lookup selector. For information on setting up products, see Setting Up Company Products (on page 1855) and Product Fields (on page 584). Only products of the category type Samples Dropped, Promotional Item Dropped, Products Detailed, or Sample Request Item that meet the following conditions can be linked to a call record: - The products are not blocked for a primary contact. - The products have been allocated to the sales representative, and the company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative (on page 1880). - The products are active on the current call date. **NOTE:** After Release 22, the Lookup selector for the Product field searches for products rather than allocations as in the earlier releases.
Product Category	(View-only) The product category that the company administrator defines. For example, it can be one of the following: - Samples Dropped - Promotional Item Dropped - Products Detailed
Call Date	(View-only) The date of the customer call.
Quantity	The number of promotional or educational items dropped off to the contact. The quantity must be a number from 1 to 9998. A warning message is displayed if you do one of the following: - Enter a value that exceeds the value in the Max Per Call field. - Enter a value that exceeds or is within 10% of the maximum quantity of product that you are allowed to drop off to a contact within the allocation period.
Max Per Allocation	(View-only) The maximum quantity of promotional items that you are allowed to drop off during the allocation period.
Max Per Call	(View-only) The maximum quantity of promotional items that you are allowed to drop off for a call.
Calculated Sum of Quantity Allocation	(View-only) The total quantity of promotional items dropped off so far during the allocation period.

Linking Sample Request Information to Calls

You can link sample request information to calls in one of the following ways:

- By adding sample request information to a parent call

- By adding attendees to a parent call and then adding the sample request information for each individual attendee record

  You add attendees to a parent account call so that the products detailed, samples dropped, sample request, and promotional item information can be tracked for each individual who attends the meeting.

  NOTE: You can also use the Order pages to create and update order items for products. If you customize the Order Detail page by adding a new field, then the new field will also be available on the Sample Request page. For more information about order items, see Creating an Order Item for Products (on page 640).

The following procedure describes how to link sample request information to a call record.

NOTE: In releases of Oracle CRM On Demand prior to Release 22, it was possible to insert a sample request item record without using an associated parent sample request record when using Web services or the Import function. However, from Release 22, when you are inserting sample request item records by using Web services or the Import function, you must provide the sample request ID of the parent sample request to provide the context for the sample request item. From the Oracle CRM On Demand user interface, you can create a sample request item only from a parent sample request in the context of a call. In addition, product-blocking rules are not followed when sample request items are inserted or updated using Web services or the Import function.

NOTE: Processing blocked products is not supported for sample request items when workflows are used in Oracle CRM On Demand. For more information, see About Sample Request Item Workflows and Blocked Product Rules (on page 647).

Before you begin. To request samples during a sales call, your user role must include the Enable Basic Samples Operations privilege.

To link sample request information to a call record

1. On the Call Detail or Attendee Detail page, click New in the Sample Request section.

   To access the Attendee Detail page, go to the Attendees section on the Call Detail page, and open the attendee record that you want.

   NOTE: If the section that you want is not visible on your page, click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

2. On the Sample Request Edit page, enter the required information for the sample request.

   For information on the sample request fields, see Sample Request Fields (on page 608).

3. Save the Sample Request record.
4. On the Sample Request Detail Page, go to the Sample Request Items section.

   NOTE: If the section that you want is not visible on your page, click the Edit Layout link in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

5. In the Sample Request Item section:

   a. Click New to add a sample request item for each requested product sample.

      NOTE: If your company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting, then only the products that are allocated to the sales representative appear in the Product selector. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative (on page 1880).

   b. In the Sample Request Item Edit page, enter the required information for the sample request item.

      The table at the end of this procedure provides additional information regarding some fields for a sample request item.

   c. Save the sample request item record.

d Add additional sample request items as required.

6 Repeat steps 1-5 to add more sample request line items to the call record.

7 When ready, click Submit to submit the call detail information for processing.

For more information, see Submitting Call Detail Information for Inventory Tracking.

Field	Description
Order Item Number	(Required) A numeric field representing an order item.
Quantity	(Required) The number of samples requested. This must be a non-zero positive integer. Oracle CRM On Demand displays a warning message if you enter one of the following: - A value that exceeds the value in the Max Qty field in your Allocation record. - A value that exceeds or is within 10% of the Max Qty per Customer field in your Allocation record.
Product	(Required) The name of the product. Select the check box next to each product that you want to request. For information on setting up products, see Setting Up Company Products (on page 1855) and Product Fields (on page 584). Only products of the category type Samples Dropped, Promotional Item Dropped, Products Detailed, or Sample Request Item that meet the following conditions can be linked to a call record: - The products are not blocked for a primary contact. - The products have been allocated to the sales representative, and the company administrator has set the Enable Filtering of Product Selection by Sales Rep Allocation setting. For more information, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative (on page 1880). - The products are active on the current call date.
Order	(Required) This field specifies the parent order for the sample request. By default this field is read-only, but it can be customized as not read-only. For information on customization, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
Additional Information	

Field	Description
Status	(Required) The default value for this field is Pending. When you submit a sample request order for products, the value in this field changes to Submitted. The possible values for this field are: - New - Open - Booked - In-transit - Partially Received - Partially Shipped - Pending - Shipped - Billed - Paid - Installed - Closed - Cancelled - Hold - Jeopardy - Actual - Approved - Projected - Rejected - Awaiting Approval - Complete - Submitted - - - Picked - Credit Failure - Event Check - Failed - Back Ordered - In Progress - Processed - Received - Signed - Voided

Saving Call Detail Information as a Template

The following procedure describes how to save call detail information as a template.

To save the call detail information as a template

- On the Call Detail page, click the appropriate button:
  - **Save as Private Smart Call.** Restricts the template for your use only.

- **Save as Public Smart Call.** Adds the template to the list for others to use.

  NOTE: Each time you click the button, the record is saved as a separate smart call. Oracle CRM On Demand remains open on this page.

Submitting Call Detail Information for Inventory Tracking

The following procedure describes how to submit call detail information for inventory tracking.

NOTE: If the call record does not contain a valid contact state license or an associated signature record, and the validation checks for these conditions have been set up by your administrator on the Life Science Related Preferences page, then Oracle CRM On Demand displays an error message and prevents the call submission. For information on the relevant preferences, see the information on Enable Contact State License Validation and Enable Signature Validation in Setting Life Sciences Related Preferences (on page 1878).

About Submitting Attendee Call and Account Calls

In releases of Oracle CRM On Demand before Release 24, if you submitted attendee call information, then Oracle CRM On Demand did not permit you to submit related account call information, and the account call remained in an ambiguous state regardless of whether the account call contained inventory items and a valid signature. However, in Release 24, the account call submission feature has been enhanced as follows:

- You can submit an account call regardless of the status of any associated attendee call.
- Even if an account call is already marked as Submitted, then clicking Submit on the Call Detail page does not result in an error, and Oracle CRM On Demand continues to check the child attendee calls and submits them if they have not been submitted already.
- If an account call is not marked as Submitted, then clicking Submit in the Call Detail page submits that account call and all the associated attendee calls that are not in Submitted status without generating an error.
- If the account call and all the attendee calls are marked as Submitted, and if you click Submit on the Call Detail page, then Oracle CRM On Demand does not generate an error, but it does not continue with call processing so that duplicate records are not created.

To submit the Call Detail information for inventory tracking

- When all of the information has been entered and saved on the Call Detail page, click Submit to submit the call detail information for processing.

  When you click Submit, a disbursement transaction is created recording the samples or promotional items that have been dropped off, and the following happens:

  - The status of the account call changes to Submitted.
  - The sales representative's sample inventory is reduced according to the promotional items and samples dropped off on the call.

    NOTE: Sample request orders do not affect the sample inventory.

  - The sample request orders are submitted.
  - The account call is closed.
  - You can only view the account call details.

About Electronic Signatures

Oracle CRM On Demand can store signature data securely, in image format, for dropped samples. Signature images are stored in Oracle CRM On Demand, using standard image formats. The signature image is a series of x- and y-coordinates or strings, which can be stored in the Oracle CRM On Demand database.

If your administrator selects the Enable Signature Validation check box on the Life Science Related Preferences page, then each call activity recorded for samples that are dropped during a sales call must have an associated signature image. It is the responsibility of the sales representative who is dropping the samples to obtain an electronic signature from the person (or company) who receives the samples. The signature can be captured on paper or by an external application (such as a mobile handheld device), and then uploaded to Oracle CRM On Demand through the Web services interface from an offline client, such as an iPad or mobile device. The sales representative must capture the signature when the samples are dropped. The sales representative cannot submit the call record in Oracle CRM On Demand until a signature record is associated with the call.

Administrators and authorized users can view the signature images that are associated with call records in Oracle CRM On Demand, but they cannot create, update, or delete the signature records. Sample administrators must regularly check the signature images to make sure that the signatures collected from a contact for different calls are consistent. For information about the user role and access profile settings that are required to check electronic signatures, see Checking Electronic Signatures (on page 575).

Checking Electronic Signatures

Use the following procedure to check the signature associated with a call activity for samples that are dropped. This procedure assumes that your user role and access profiles are set up to allow you to view the signature records that are attached to calls. The following setup is required to view signature records:

- The Enable Basic Samples Operations privilege must be enabled on your user role.
- In the record-type access settings on your user role, the Has Access and Can Read All Records check boxes must be selected for the Signature record type.
- The Signature related information section must be present on the Contact Call Detail page layout for your user role.
- In your default access profile, in the settings for the related information for the Activity record type, the access level for the Signature record type must be set to a value that allows you to read the signature records.

Typically, only administrators are given access to signature records. For more information about signatures, see About Electronic Signatures (on page 574).

NOTE: If your user role and access profiles are set up to allow you to view the signature records that are attached to calls, then you can view the signature record, but you cannot create, update, or delete signature records or the signature images on those records. In addition, if a file is attached to a signature record, then you can view the attached file, or replace it with a different file, or remove the file from the record.

To check sample signatures

1. On the Contacts Homepage, open the contact that you want.
2. On the Contact Detail page, in the Completed Activities section, drill down on the Subject field to open the call activity record that you want.
3. On the Call Detail page, scroll to the Signature section.

   The following table describes the fields that are shown in the Signature section in the standard application.

Field	Description
Title Field	Clicking the View link in this field opens the signature record.
Signature Date	The date the signature was captured.
Contact First Name	The first name of the recipient of the samples.
Contact Last Name	The last name of the recipient of the samples.

Field	Description
Sales Rep First Name	The first name of the sales representative who dropped the samples.
Sales Rep Last Name	The last name of the sales representative who dropped the samples.

4 Click the View link for the signature record that you want to view.

NOTE: You cannot edit the details of an existing signature record, or create a new signature record.

5 On the Signature Detail Page, you can do the following:

- View the signature image.
- Click Edit to open the Signature Edit page, and then attach a file to the signature record, or view or remove a file that is attached to the record.

The following table provides information regarding some of the fields on the Signature Detail page in the standard application.

Field	Description
Disclaimer Text	The Disclaimer Text field displays the disclaimer text that is associated with the dropped samples. You cannot edit, insert, or delete any portion of the disclaimer text. The disclaimer text is uploaded to Oracle CRM On Demand through the Web services interface from an offline client, such as an iPad or mobile device. This field includes the full disclaimer text in the language specified for the disclaimer, and it displays the exact text viewed by physicians when they sign for the receipt of samples. For more information on sample disclaimers, see Sample Disclaimers (on page 597).
Attachment	If this field is displayed on the page, then you can attach a file to the signature record. The field initially shows a paper clip icon on the record Edit page:  You can attach a file to the signature record by clicking the paper clip icon on the record Edit page and then selecting the file that you want to upload. After the file is uploaded and the record is saved, the Attachment field on the record Detail page shows the name and size of the attachment file. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file. For information on attaching files to records, using the Attachment field, and information about the restrictions on file sizes and file types, see Attaching Files to Records through Attachment Fields (on page 167).

About the Relationship Between Sample Transactions and Sample Inventory

The following table shows the relationship between sample transactions, transaction types, and the impact on the sample inventory for sales representatives.

NOTE: Transfer Out and Inventory Adjustment (samples lost and found) are user-generated transactions. Oracle CRM On Demand generates Disbursement and Transfer In transaction types.

Sample Transaction Record	Description	Transaction Type	Sample Inventory Impact
Disbursement Transaction	Transactions where the sales representative submits and drops off samples. Oracle CRM On Demand generates disbursement transactions automatically whenever sales representatives drop off samples during sales calls. For more information, see Viewing Disbursement Transactions (on page 557).	Disbursement	Sample transactions of type Disbursement are subtracted from a sales representative's sample inventory.
Received Transaction	Transactions where the sales representative receives samples. Users must acknowledge the receipt of samples. For more information, see Acknowledging Receipt of the Sample Inventory (on page 545).	Transfer In	Sample transactions of type Transfer In are added to a sales representative's sample inventory.
Sent Transaction	Transactions in which the sales representative transfers samples to another user or sends unused samples to headquarters. For more information, see Creating a Samples Transfer (on page 553).	Transfer Out	Sample Transactions of type Transfer Out are subtracted from a sales representative's sample inventory.
Adjustment Transaction	Transactions created by the sales representative to reconcile discrepancies between the physical counts of samples and records in Oracle CRM On Demand. For more information, see Adjusting Sample Transactions (on page 555).	Inventory Adjustment	Sample Transactions of type Inventory Adjustment are added or subtracted from a sales representative's inventory as required. For example: Sample transactions of type Inventory Adjustment and with an adjustment reason of Found are added to a sales representative's sample inventory. In this case, the value in the Quantity field for the transaction item is treated as a positive number.
Lost Transaction	Transactions created by the sales representative to record samples that have been lost. Lost sample transactions are submitted as adjustments. For more information, see Creating Lost and Found Sample Transactions (on page 556).	Inventory Adjustment, with a reason of Lost	Sample transactions of type Inventory Adjustment and with an adjustment reason of Lost are subtracted from a sales representative's sample inventory. In this case, the value in the Quantity field for the transaction item is treated as a negative number.

Monitoring Sample Activities

The samples administrator is responsible for the samples inventory of the company and making sure that it complies with regulatory rules and regulations.

Before you begin. To monitor sample activities, your user role must be assigned administrative responsibilities and must include the following privileges:

- Enable Basic Samples Operations privilege
- Enable Samples Adjustment privilege

To monitor samples activities, click the list that you want to monitor in the Sample Transaction List section on the Sample Transaction Homepage. The following table describes the purpose of each list.

Sample Transaction List	Filters
Disbursement Transactions	Shows all samples that were submitted and dropped. Monitoring this list allows the samples administrator to review all samples that have been dropped.
Sent Transactions	Shows all samples that were submitted and transferred. Monitoring this list allows the samples administrator to review all samples returned or shipments transferred between end users.
Received Transactions	Shows all samples that were submitted and received. Monitoring this list allows the samples administrator to review received shipments between end users.
Adjustment Transactions	Shows all adjustment transactions that have been submitted. Monitoring this list allows the samples administrator to review all types of adjustment transactions that have been submitted by end users and samples administrators to reconcile discrepancies between physical counts and records in Oracle CRM On Demand.
Lost Transactions	Shows all lost samples that were submitted as adjustments. Monitoring this list allows the administrator to review the samples that have been lost.

For information on viewing or creating these lists, see Working with Lists (on page 125) and Creating and Refining Lists (on page 130).

To view a list, click the list name.

To create a new list, click New.

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Sample Transaction Fields

Use the Sample Transaction Edit page to add a sample transaction, or update details for an existing sample transaction that has a status of In Progress. The Sample Transaction Edit page shows the complete set of fields for a sample transaction.

TIP: You can also edit sample transactions on the Sample Transaction List page and the Sample Transaction Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the sample transaction fields. Depending on the type of sample transaction that you have open (Transfer In, Transfer Out, Inventory Adjustment, Disbursement, Samples Lost), all of these fields might not be applicable.

Field	Description
Key Transaction Information	
Name	The unique identifier of the sample transaction (this is system generated).
Date	The date for the sample transaction. When you enter a date that falls within an active inventory period, the Inventory Period: Start Date and Inventory Period: End Date fields are automatically populated. An error message is displayed if you enter a date that does not fall within any existing inventory periods. You can enter a date that is in the future if Allow Submission of Future Calls & Sample Transaction is set by your administrator. For more information, see Setting Life Sciences Related Preferences (on page 1878). **NOTE:** If you submit a future call to start a transaction, then Oracle CRM On Demand associates the sample transaction record with the active inventory period. The sample transaction remains associated with the current active inventory period, even if you close the inventory period before the date of the future call. The sample transaction is not associated with the more current inventory period. Sample transactions cannot be created for reconciled periods. Oracle CRM On Demand displays an error message if you enter a date that falls within a reconciled period or an inactive period.
Type	The type of sample transaction can be one of the following: - Transfer Out - Inventory Adjustment - Samples Lost - Sample Request - Disbursement - Transfer In Transfer Out, Inventory Adjustment, Samples Lost, and Sample Request are user generated transactions; Disbursement and Transfer In are system generated transactions.

Field	Description
	NOTE: It is critical that you do not customize or change the order of the Type picklist for Sample Transaction Field Setup as the cascading picklist functionality may be affected.
Status	The status of the sample transaction can be one of the following: - In Progress - Submitted - Processed with Discrepancies - In Transit - Processed - Adjusted
Expected Delivery Date	The date that the sample is due to be delivered.
Tracking #	A unique number that you and the customer can use to track the delivery of the sample.
# of Packages Sent	The number of packages that are included in the sample.
Transfer To	The person to whom a transfer out transaction is logged. This person receives the sample and must acknowledge receipt of the sample. When creating a transfer out transaction, this is a required field.
Transfer From	The person who is transferring the samples (that is, the person who creates the Transfer Out transaction).
Inventory Period: Start Date	The start date of the inventory period associated with the sample transaction. This is a read-only field, which is automatically populated only when the date that you enter in the Date field falls within an active inventory period. The inventory period restricts the products and sample lot numbers that are available for selection when adding Transaction Item line items. It also ensures that for the selected inventory period, only valid products and sample lot numbers are available for selection.
Inventory Period: End Date	The end date of the inventory period associated with the sample transaction. This is a read-only field, which is automatically populated only when the date that you enter in the Date field falls within an inactive inventory period. The inventory period restricts the products and sample lot numbers that are available for selection when adding Transaction Item line items. It also ensures that for the selected inventory period, only valid products and sample lot numbers are available for selection.
Adjustment Reason	The reason for creating or adjusting the sample transaction. Reason codes include the following: - Lost - Found - Theft

Field	Description
	■ Human Error ■ Initial Count ■ Request
Comments	The user can enter additional information about the sample transaction in this field.
Attachment	If this field is exposed on the page, you can attach a file to the sample transaction record. The field initially shows a paper clip icon on the record Edit page:  You can attach a file to the sample transaction record by clicking the paper clip icon on the record Edit page and then selecting the file that you want to upload. After the file is uploaded and the record is saved, the Attachment field on the record Detail page shows the name and size of the attachment file. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file. You can attach only one file to each sample transaction record. For instructions on attaching files to records through the Attachment field, and information about the restrictions on file sizes and file types, see Attaching Files to Records through Attachment Fields (on page 167).
Key Contact Information **NOTE:** This read-only information is populated for disbursement transactions only. Oracle CRM On Demand automatically generates disbursement transactions whenever sales representatives drop or disburse samples during a sales call. For more information, see Dropping Samples During a Sales Call (on page 558) and Viewing Disbursement Transactions (on page 557).	
Contact	The full name of the physician or hospital contact to whom the disbursement was made.
Contact First Name	The first name of the contact to whom the disbursement was made.
Contact Last Name	The last name of the contact to whom the disbursement was made.
Contact Type	The contact type.
Contact Account	The account associated with this contact.
Contact Email	The email address for this contact.

Related Information

See the following topics for related, sample transaction information:

- Sample Transactions (on page 550)
- Working with the Sample Transaction Homepage (on page 550)
- Managing Sample Transactions (on page 552)

Transaction Items

Use the Transaction Item pages to create, update, and track transaction items for samples.

A *transaction item* records the details of the sample or promotional items associated with a sample transaction. For each sample transaction, one or more transaction item line items must exist. This information is used to calculate a running count of inventory for the sales representative. Sample transactions are used in the reconciliation process to account for all samples and promotional items that have been assigned to a sales representative.

Managing Transaction Items

For step-by-step procedures for managing transaction items, see:

- Modifying the Sample in a Transaction Item (on page 582)
- Modifying the Sample Lot in a Transaction Item (on page 583)
- Adding Transaction Items to a Sample Transaction (on page 557)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

- Transaction Items (on page 582)
- Transaction Item Fields (on page 583)
- Product Fields (on page 584)

Modifying the Sample in a Transaction Item

Use the Product Edit page to modify the sample in a transaction item. The Product Edit page shows the complete set of fields for a product.

Before you begin. To modify samples in a transaction item, your user role must include the Enable Basic Samples Operations privilege.

To modify the sample in a transaction item

1. On the Sample Transaction List page, drill down on the Name field to open the transaction record that you want.

   NOTE: The transaction record that you open must have a status of In Progress. Transactions that have a status of Submitted cannot be modified.

2. On the Sample Transaction Detail page, go to the Transaction Item line item that you want to modify.
3. In the Sample field of the Transaction Item line item, click the Lookup icon to select a different sample to associate with the Transaction Item line item, if required.

4 In the Sample field of the Transaction Item line item, click the name of the sample, click Edit on the Product Details page, and then modify the fields as required.

For more information, see Product Fields (on page 584).

Modifying the Sample Lot in a Transaction Item

Use the Sample Lot Edit page to modify the sample lot in a transaction item. The Sample Lot Edit page shows the complete set of fields for a sample lot.

Before you begin. To modify sample lots in a transaction item, your user role must include the Enable Basic Samples Operations privilege.

To modify the sample lot in a transaction item

1 On the Sample Transaction List page, drill down on the Name field to open the transaction record that you want.

NOTE: The transaction record that you open must have a status of In Progress. Transactions that have a status of Submitted cannot be modified.

2 On the Sample Transaction Detail page, go to the Transaction Item line item that you want to modify.

3 In the Lot # field of the Transaction Item line item, click the Lookup icon to select a different sample lot to associate with the Transaction Item line item, if required.

NOTE: Only sample lots that are being tracked by lot number in the inventory (that is, sample lots that have the Inventory by Lot check box selected) are available for selection.

4 In the Lot # field of the Transaction Item line item, click the name of the sample lot, click Edit on the Sample Lot Detail page, and then modify the sample lot fields as required (see Sample Lot Fields (on page 595) for more information).

Transaction Item Fields

Use the Transaction Item Edit page to add a transaction item or update details for an existing transaction item.

TIP: You can also edit transaction items on the Transaction Item Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the transaction item fields.

Field	Description
Line Number	A unique number that is assigned manually to each item.
Sample	The name of the sample or promotional item.
Lot #	The unique number or name assigned to the sample for tracking purposes. A sample might or might not be tracked by a lot number. This field is optional. **NOTE:** When adding or updating a transaction item, click the Lookup icon to select a sample lot. Only sample lots that are being tracked by lot number in the inventory (that is, sample lots that have the Inventory by Lot check box selected) are available for selection. For more

Field	Description
	information about sample lots, see Sample Lots (on page 593) and Sample Lot Fields (on page 595).
Quantity	The quantity of the sample. This field is required. **NOTE:** If the quantity value is less than the initial quantity of sample inventory transferred from headquarters, then use the minus sign with the numeric value. This field is important for recording adjustments such as loss, theft, or human error.

Related Topics

See the following topics for related information about transaction items:

- Transaction Items (on page 582)
- Managing Transaction Items (on page 582)
- Adding Transaction Items to a Sample Transaction (on page 557)

Product Fields

Use the Product Edit page to define and manage your company's list of products. The Product Edit page shows the complete set of fields for a product. For information about setting up products for your company, see Setting Up Company Products (on page 1855).

TIP: You can also edit products on the Product Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the product fields.

Field	Description
Key Product Information	
Product Name	The name of the product.
Product Category	The product category, as defined by product administrator at the company. For example, it can be one of the following: - Samples Dropped - Promotional Item Dropped **NOTE:** Do not change the seed data for the product category. Some filters in Oracle CRM On Demand have been created for Samples Dropped and Promotional Item Dropped. You can add new product categories, which are based on your customer requirements.

Field	Description
Solution	The product image file associated with this product. The image file is used to describe the product during a sales call. **NOTE:** This field is available with Oracle CRM On Demand Life Sciences Edition and might not be available for your configuration. If you require this field and it is not available, contact your company administrator.
Part #	The manufacturer part number associated with the product. The company specifies the part number.
Orderable	A check box to indicate how the sample product can be ordered: ■ If selected, the sample product can be ordered by the sales representative and can be shipped from the company to the physician, clinic, or hospital. ■ If not selected, the sample can be obtained only when the sales representative makes a sample drop.
Type	The type of product can be one of the following: ■ **Product.** A physical item manufactured by the customer. ■ **Service.** A value added event that provides a service to the customer - could include such items as consulting time. ■ **Training.** A value added event that provides education to the customer - includes such items as labs, manuals, hands on training, lectures, and so on.
Status	The company defines the product status. The values include the following: ■ **Available.** The product is available for sample transfers and sample drops. ■ **Active.** There are active sample transfers and drops for this product. ■ **Pending.** The product is not ready to be dropped but is in the process of being made available. ■ **Bundle.** A group of products or services have been packaged together and are dependent on each other. ■ **Prototype.** The product is not ready for general availability but an example of the product can be examined or studied. ■ **Terminated.** The product is no longer available for sample transfers and sample drops and will not be available in the future. ■ **Closed.** This means the same as Terminated, except that the product will be available until there is no product left to transfer or drop.
Additional Information	
Description	A description of the product sample.

Allocations

Use the Allocation pages to create, update, and track allocations for a sample.

The samples administrator of a pharmaceutical company defines an allocation record. This allocation record determines the period in which sample products are given to the sales representative to distribute to clinics, hospitals, or physician contacts. Additionally, the allocation information defines the following:

- The number of samples of a particular product that is allowed to be dropped at a particular time
- The maximum number of samples that a sales representative is allowed to distribute to a given location

This feature allows the samples administrator to set those parameters at the product level and communicate this information to all the sales representatives. Using allocations, you can define the allocation period, allocate samples within that allocation period, view the list of samples available for each allocation period, and set the maximum parameters for distributing that sample during that allocation period.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking allocation information, the Allocation tab might be excluded from your setup.

Working with the Allocation Homepage

The Allocation Homepage is the starting point for managing allocations.

NOTE: Your company administrator can customize the layout of your Allocation Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Before you begin. To work with allocations, your user role must include the Enable Basic Samples Operations privilege.

Creating an Allocation

The samples administrator creates a new allocation by clicking the New button in the Recently Modified Allocations section. For more information, see Creating Records (on page 51) and Allocation Fields (on page 588).

Working with Allocation Lists

The Allocation List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for allocations.

Allocation List	Filters
All Allocations	All allocations to which you have visibility, regardless of who owns the allocation.
Recently Modified Allocations	All allocations with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Allocations

The Recently Modified Allocations section shows the allocations that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to your Allocation Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Allocation Homepage:

- Recently Created Allocations
- Recently Modified Allocations
- My Recently Created Allocations
- My Recently Modified Allocations
- Additional report sections (Your company administrator can make report sections available for display on your Allocation Homepage.)

To add sections to your Allocation Homepage

1. On the Allocation Homepage, click Edit Layout.
2. On the Allocation Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about allocations:

- Allocations (on page 585)
- Allocation Fields (on page 588)
- Managing Allocations (on page 587)

Managing Allocations

For step-by-step procedures for managing allocations, see:

- Allocating Samples to End Users (on page 587)
- Modifying the Sample in an Allocation (on page 588)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Viewing Audit Trails for Records (on page 175)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about allocations:

- Allocations (on page 585)
- Working with the Allocation Homepage (on page 586)
- Allocation Fields (on page 588)

Allocating Samples to End Users

Use the Allocation Detail page to allocate samples to an end user.

For adding multiple allocation records, it is recommended that the samples administrator create an import file (mapping end users to product allocations), and then load the data into Oracle CRM On Demand.

Before you begin. To allocate samples to end users, your user role must include the Enable Basic Samples Operations privilege.

To allocate samples to an end user

1. On the Allocation List page, drill down on the Allocation Type field to open the allocation record that you want.
2. On the Allocation Detail page, click the Lookup icon beside the Owner field, and select the end user. Click Save.

Modifying the Sample in an Allocation

Use the Product Edit page to modify the sample in an allocation. The Product Edit page shows the complete set of fields for a product.

Before you begin. To modify the sample in an allocation, your user role must include the Enable Basic Samples Operations privilege.

To modify the sample in an allocation

1. On the Allocation List page, drill down on the Allocation Type field to open the allocation record that you want to modify.
2. On the Allocation Detail page in the Sample field, click the Lookup icon to select a different sample to associate with the allocation record, if required.
3. On the Allocation Detail page in the Sample field, click the name of the sample, click Edit on the Product Details page, and then modify the fields as required (see Product Fields (on page 584) for more information).

Allocation Fields

Use the Allocation Edit page to add an allocation or update details for an existing allocation. The Allocation Edit page shows the complete set of fields for an allocation.

TIP: You can also edit allocations on the Allocation List page and the Allocation Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the allocation fields.

Field	Description
Allocation Type	The allocation name is defined by the samples administrator. It must be unique. Some examples include: - Sample Allocation - Promotional Item Allocation
Active	The status of the allocation can be one of the following: - **Active.** Indicates that the end date for the allocation period has not yet occurred. - **Inactive.** Indicates that the allocation period has completed and the end date has been reached.

Field	Description
Owner	The owner of the allocation record. This is the person to whom the samples administrator assigns the allocation.
Sample	The product sample associated with this allocation. **NOTE:** When creating a new allocation record, only products that are categorized as samples (that is, products of the category type, Samples Dropped) can be entered in this field.
Max Qty	The maximum quantity of product allowed to be dropped off for a call. **NOTE:** When dropping off samples or promotional items, a warning message will appear if you exceed or are nearing the Max Qty value.
Allocation Qty	The maximum quantity of product allowed to be dropped off within the allocation period.
Max Qty Per Customer	The maximum quantity of product allowed to be dropped off to a contact within the allocation period. **NOTE:** When dropping off samples or promotional items to a contact, a warning message will appear if you exceed or are within 10% of the Max Qty Per Customer value.
Sample: Description	Text field to describe the allocation record, for example, the purpose of the allocation.
Owner: First Name	The first name of the owner of the allocation record, typically the user who created the record.
Owner: Last Name	The last name of the owner of the allocation record, typically the user who created the record.
Start Date	The start date for this allocation.
End Date	The end date for this allocation.
Stop Sampling	A check box to indicate whether to continue delivering samples: ■ If selected, then sample drops are no longer allowed. ■ If not selected, then sample drops are allowed.
Order By	This field allows sales representatives to view their allocations in a specified order.
Additional Fields: **NOTE:** Your company administrator must configure the following fields because they are not available by default.	
Remaining Qty	The quantity of the product that remains available for the sales representative to drop off during the allocation period. Oracle CRM On Demand initializes this field with the Allocation Qty field value.

Field	Description
Distributed Qty	The quantity of the product that has been distributed by a sales representative to a contact during the allocation period. Oracle CRM On Demand initializes this field with the value of zero (0).

Related Topics

See the following topics for related information about allocations:

- Allocations (on page 585)
- Working with the Allocation Homepage (on page 586)
- Managing Allocations (on page 587)

HCP Contact Allocations

Use the HCP Contact Allocation pages to specify the maximum quantity of a product or sample that a health care professional (HCP) contact, (for example, a physician) can receive from sales representatives. In contrast, an Allocation record specifies the maximum quantity of a product or sample that an individual sales representative can drop or detail to a contact, within the allocation period. For more information on allocations, see Allocations (on page 585).

HCP contact allocations are typically managed by a samples administrator in a pharmaceutical company. You can work with HCP contact allocations if your user role includes the Enable Basic Samples Operations privilege. For each contact, you can create multiple HCP contact allocation records. For each HCP contact allocation record, you can specify the allocation type, a start date and an end date for the allocation period, and the number of samples of the specified product that can be given to the contact during the allocation period.

Although you can create HCP contact allocation records directly through the HCP Contact Allocation pages to create an individual record, it is recommended that you import the HCP contact allocation records into Oracle CRM On Demand, particularly when you must create a large number of records. For more information on importing HCP contact allocations, see HCP Contact Allocation Fields: Import Preparation (on page 1747).

You can view HCP contact allocations as a view-only related item in a contact record, provided your company administrator has set this up for your company.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking allocations for HCP contacts, then the HCP Contact Allocation tab might be excluded from your setup.

Working with the HCP Contact Allocation Homepage

The HCP Contact Allocation Homepage is the starting point for managing HCP contact allocations.

NOTE: Your company administrator can customize the layout of your HCP Contact Allocation Homepage. In addition, if your user role includes the Personalize Homepages privilege, then you can add sections and remove sections from the page.

Before you begin. To work with HCP contact allocations, your user role must include the Enable Basic Samples Operations privilege.

Creating an HCP Contact Allocation

The samples administrator creates a new HCP contact allocation by clicking the New button in the Recently Modified HCP Contact Allocations section. For more information, see Creating Records (on page 51) and HCP Contact Allocation Fields (on page 592).

NOTE: Although you can create HCP contact allocation records directly through the HCP Contact Allocation pages to create an individual record, it is recommended that you import the HCP contact allocation records into Oracle CRM On Demand, particularly when you must create a large number of records. For more information on importing HCP contact allocations, see HCP Contact Allocation Fields: Import Preparation (on page 1747).

Working with HCP Contact Allocation Lists

The HCP Contact Allocation Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for HCP contact allocations.

HCP Contact Allocation List	Filters
All HCP Contact Allocations	All HCP contact allocations to which you have visibility
Recently Modified HCP Contact Allocations	All HCP contact allocations to which you have visibility, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified HCP Contact Allocations

The Recently Modified HCP Contact Allocations section shows the HCP contact allocations that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to your HCP Contact Allocation Homepage

If your user role includes the Personalize Homepages privilege, then you might be able to add additional report sections to your HCP Contact Allocation Homepage. Your company administrator can make report sections available for display on your HCP Contact Allocation Homepage.

To add sections to your HCP Contact Allocation Homepage

1. On the HCP Contact Allocation Homepage, click Edit Layout.
2. On the HCP Contact Allocation Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about HCP contact allocations:

- HCP Contact Allocations (on page 590)
- Managing HCP Contact Allocations (on page 591)
- HCP Contact Allocation Fields (on page 592)

Managing HCP Contact Allocations

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Viewing Audit Trails for Records (on page 175)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about HCP contact allocations:

- HCP Contact Allocations (on page 590)
- Working with the HCP Contact Allocation Homepage (on page 590)
- HCP Contact Allocation Fields (on page 592)

HCP Contact Allocation Fields

Use the HCP Contact Allocation Edit page to add an HCP contact allocation or to update the details of an existing allocation. The HCP Contact Allocation Edit page shows the complete set of fields for an HCP contact allocation.

TIP: You can also edit HCP contact allocations on the HCP Contact Allocation List page and the HCP Contact Allocation Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the HCP contact allocation fields.

Field	Description
HCP Contact Allocation ID	A unique ID generated by Oracle CRM On Demand for this record.
Type	The type of allocation that you want to create. By default, the following allocation types are available for HCP contact allocations, but your company administrator can add or remove allocation types: - Detail Allocation - Sample Allocation - Sample Request Allocation - Promotional Item Allocation Detail Allocation, Sample Allocation, Sample Request Allocation, and Promotional Item Allocation are designations that users create. They use them for filtering related item sections when managing samples. **CAUTION:** You must not customize or change the order of the Type picklist for HCP Contact Allocation Field Setup because the cascading picklist functionality might be affected.
Product Name	The name of the product sample to be allocated to the HCP contact.

Field	Description
Contact Name	The name of the HCP contact for whom you want to specify the allocation.
Allocation Qty	The total number of samples of a specified product that the HCP contact can receive during the allocation period. When initializing the HCP Contact Allocation record, set the value for the Allocation Qty field to be equal to the Qty Remaining field. Quantity fields must have integer values.
Qty Distributed	The number of samples of the specified product that have already been given to the contact during the allocation period. When the HCP contact allocation is first created, the Qty Distributed field must be zero. Quantity fields must have integer values.
Qty Remaining	The number of samples of the specified product that remain available to be given to the specified HCP contact during the allocation period. When initializing the HCP Contact Allocation record, set the value for the Qty Remaining field to be equal to the Allocation Qty field. Quantity fields must have integer values.
Start Date	The start date for this allocation.
End Date	The end date for this allocation.

Related Topics

See the following topics for related information about HCP contact allocations:

- HCP Contact Allocations (on page 590)
- Working with the HCP Contact Allocation Homepage (on page 590)
- Managing HCP Contact Allocations (on page 591)

Sample Lots

Use the Sample Lot pages to create, update, and track sample lots.

A product, as it is being manufactured, is given a lot number. Companies use this lot number to track products. Tracking is essential if a particular product has to be recalled, or if a defect is detected during production. Knowing where all their products are located is critical to many companies. Oracle CRM On Demand provides the option to track the samples being dropped using lot numbers. The samples administrator of a company decides whether to use lot numbers.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking sample lot information, the Sample Lot tab might be excluded from your setup.

Working with the Sample Lot Homepage

The Sample Lot Homepage is the starting point for managing sample lots. This page displays information that is relevant to you.

NOTE: Your company administrator can customize the layout of your Sample Lot Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Before you begin. To work with sample lots, your user role must include the Enable Basic Samples Operations privilege.

Creating a Sample Lot

You can create a new sample lot by clicking the New button in the Recently Viewed Sample Lots section. For more information, see Creating Records (on page 51) and Sample Lot Fields (on page 595).

Working with Sample Lot Lists

The Sample Lot List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for sample lots.

Sample Lot List	Filters
All Sample Lots	All sample lots to which you have visibility, regardless of who owns the sample lot. **NOTE:** Only sample lots that are being tracked by lot number in the inventory are displayed in the All Sample Lots list (see Sample Lot Fields (on page 595) for more information).
Recently Modified Sample Lots	All sample lots with your name in the Owner field, sorted by the modified date. **NOTE:** Only sample lots that are being tracked by lot number in the inventory are displayed in the Recently Modified Sample Lots list (see Sample Lot Fields (on page 595) for more information).

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Sample Lots

The Recently Modified Sample Lots section shows the sample lots most recently modified.

Click Show Full List to expand the list.

Adding Sections to Your Sample Lot Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Sample Lot Homepage:

- Recently Created Sample Lots
- Recently Modified Sample Lots
- My Recently Created Sample Lots
- My Recently Modified Sample Lots

- Additional report sections (Your company administrator can make report sections available for display on your Sample Lot Homepage.)

To add sections to your Sample Lot Homepage

1. On the Sample Lot Homepage, click Edit Layout.
2. On the Sample Lot Homepage Layout page, use the directional arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Related Topics

See the following topics for related information about sample lots:

- Sample Lots (on page 593)
- Sample Lot Fields (on page 595)
- Managing Sample Lots (on page 595)

Managing Sample Lots

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about sample lots:

- Sample Lots (on page 593)
- Working with the Sample Lot Homepage (on page 593)
- Sample Lot Fields (on page 595)

Sample Lot Fields

Use the Sample Lot Edit page to add a sample lot or update details for an existing sample lot. The Sample Lot Edit page shows the complete set of fields for a sample lot.

TIP: You can also edit sample lots on the Sample Lot List page and the Sample Lot Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the sample lot fields.

Field	Description
Lot Number	The specified manufacturing lot number for the product.
Sample	The name of the sample product. **NOTE:** When creating a new sample lot record, only products that are categorized as samples (that is, products of the category type, Samples Dropped) can be entered in this field.
Start Date	The date that the sample lot became available.
Expiration Date	The date that the sample lot expires.
Short Days	The number of days for which the samples administrator has determined to stop sampling, prior to the expiration date. This numeric value is used in the calculation of the cut-off date.
CutOff Date (CutOff_Date)	The calculated date on which the sample lot is no longer valid to drop. This date is calculated by Oracle CRM On Demand by subtracting the number of short days from the expiration date. **NOTE:** You may see the field name CutOff_Date instead of CutOff Date according to what has been set up by your company administrator. CutOff_Date is used if you require date processing in your application, for example, in Oracle CRM On Demand Disconnected Mobile Sales. CutOff Date is the text version of CutOff_Date.
Status	This is a read-only field, which indicates whether the sample can be fulfilled. The possible values are as follows: - **Good.** Indicates that the current date is before the cut-off date - **Expired.** Indicates that the current date is after the expiration date - **Short Dated.** Indicates that the current date is between the expiration date and cut-off date
Inventory by Lot	A check box that indicates whether the sample lot is being tracked on a lot number basis in the inventory. The company administrator defines this field. - If selected, then this sample lot will be tracked by lot number in the inventory. - If not selected, then this sample lot will not be tracked by lot number in the inventory.
Sample: Part #	The sample product number.
Description	A general description of the sample lot.

Related Topics

See the following topics for related information about sample lots:

- Sample Lots (on page 593)
- Working with the Sample Lot Homepage (on page 593)
- Managing Sample Lots (on page 595)

Sample Disclaimers

Use the Sample Disclaimer pages to create, update, and track disclaimers for a company. When a sales representative captures a signature for a sample that has been dropped, the corporate disclaimer is presented to the physician to view.

A *sample disclaimer* is the text that is displayed to deny responsibility for certain adverse effects and reduce liability for a product sample that is dropped off to a physician or other health care professional. The wording of the text in each disclaimer is carefully written and approved by legal, marketing, or sample compliance officers from the pharmaceutical company, or both. In Oracle CRM On Demand, the text for only one sample disclaimer is active at any time for a company.

Oracle CRM On Demand supports two types of sample disclaimers:

- **Global.** A *global sample disclaimer* contains one disclaimer record for each company instance. This disclaimer applies to all products provided as samples, and is displayed at the time of signature capture to confirm receipt of the product samples. Only one global sample disclaimer can be active at any time. This global sample disclaimer is the default type for Oracle CRM On Demand.
- **Multilingual.** A *multilingual sample disclaimer* contains an unlimited number of sample disclaimers text records in multiple languages, which are grouped by the countries that apply to the disclaimer. Each disclaimer record consists of a header section, which includes the relationship code (which represents the derived name for the disclaimer), type, status, language, and country for the disclaimer, and a language-specific Related Disclaimer section that contains the translated disclaimer text required by the company. For more information on these fields and the Related Disclaimer section, see Sample Disclaimer Fields (on page 602). More than one set of multilingual sample disclaimers can be active at the same time. Before you can use multilingual sample disclaimers, your company administrator must set up special page layouts as described in the *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Customers typically start with only global disclaimers, and then they customize them to be multilingual as required. Although it is possible to have a hybrid of global and multilingual disclaimers, customers typically use only one type or the other.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking disclaimer information, the Sample Disclaimer tab might be excluded from your setup.

Working with the Sample Disclaimer Homepage

The Sample Disclaimer Homepage is the starting point for managing sample disclaimers. This page displays information that is relevant to you.

NOTE: Your company administrator can customize the layout of your Sample Disclaimer Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Before you begin. To work with sample disclaimers, your user role must include the Enable Basic Samples Operations privilege.

Creating a Sample Disclaimer

You can create a sample disclaimer by clicking New in the Recently Modified Sample Disclaimers section. All sample disclaimers have a status of Inactive when created. For more information, see Creating Records (on page 51) and Sample Disclaimer Fields (on page 602).

NOTE: When you copy a sample disclaimer, it does not copy any child related disclaimer records, however, when you delete a sample disclaimer, the entire disclaimer along with any child related disclaimer records are deleted.

Working with Sample Disclaimer Lists

The Sample Disclaimer List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for sample disclaimers.

Sample Disclaimer List	Filters
All Sample Disclaimers	All sample disclaimers to which you have visibility, regardless of the disclaimer type or who owns the sample disclaimer.
Recently Modified Sample Disclaimers	All sample disclaimers that have been modified recently, sorted by the modified date. Click the sample disclaimer relationship code (that is, the derived name for the disclaimer) to open the parent Sample Disclaimer detail page.

NOTE: Your company administrator might set up additional customized lists, for example, to display multilingual disclaimers. For more information on setting up customized lists and page layouts, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Sample Disclaimers

The Recently Modified Sample Disclaimers section shows the sample disclaimers that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Sample Disclaimer Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Sample Disclaimer Homepage:

- Recently Created Sample Disclaimers
- Recently Modified Sample Disclaimers
- Additional report sections (Your company administrator can make report sections available for display on your Sample Disclaimer Homepage.)

To add sections to your Sample Disclaimer Homepage

1. On the Sample Disclaimer Homepage, click Edit Layout.
2. On the Sample Disclaimer Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about sample disclaimers:

- Sample Disclaimers (on page 597)
- Managing Sample Disclaimers (on page 599)

- Sample Disclaimer Fields (on page 602)
- Related Disclaimer Fields (on page 604)

Managing Sample Disclaimers

For step-by-step procedures for managing sample disclaimers, see the following:

- Creating Global Sample Disclaimers (on page 599)
- Creating Multilingual Sample Disclaimers (on page 600)
- Marking a Related Disclaimer as the Default (on page 600)
- Activating a Sample Disclaimer (on page 600)
- Converting Global Disclaimers to Multilingual Disclaimers (on page 602)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

- Sample Disclaimers (on page 597)
- Working with the Sample Disclaimer Homepage (on page 597)
- Sample Disclaimer Fields (on page 602)
- Related Disclaimer Fields (on page 604)

Creating Global Sample Disclaimers

A global sample disclaimer contains the sample disclaimer text instance to use for your company and is available by default.

Before you begin. To create a global sample disclaimer, your user role must include the Enable Basic Samples Operations privilege.

To create a global sample disclaimer

1. On the Sample Disclaimer Homepage, click New in the Recently Modified Sample Disclaimers section.
2. Complete the fields in the Key Disclaimer Information section.

   For more information on Sample Disclaimer fields, see Sample Disclaimer Fields (on page 602).

   Note: If the Type field is available on the Disclaimer record, ensure it is set to Global.
3. Save the Sample Disclaimer record.

   Oracle CRM On Demand creates the new sample disclaimer record with a status set to Inactive.

Creating Multilingual Sample Disclaimers

A multilingual sample disclaimer consists of a main header section, which includes information, such as the relationship code (the derived name for the disclaimer), language, and country for the sample disclaimer. It also includes multiple, related disclaimer records. Each record contains the disclaimer text in one of the languages that are applicable to the disclaimer.

Before you begin. To create a multilingual sample disclaimer, your user role must include the Enable Basic Samples Operations privilege, and your company administrator must set up the page layouts for multilingual sample disclaimers.

To create a multilingual sample disclaimer

1. On the Sample Disclaimer Homepage, click New in the Recently Modified Multilingual Sample Disclaimers list.
2. Complete the fields in the Key Disclaimer Information section.

   Note: If the Type field is available on the Disclaimer record, then set the field to Multilingual.

   For information on Sample Disclaimer fields, see Sample Disclaimer Fields (on page 602).
3. Save the sample disclaimer record.

   Oracle CRM On Demand creates the new sample disclaimer record with a status set to Inactive.
4. Complete the Related Disclaimer section containing the translated disclaimer text for the sample disclaimer:
   a. In the Related Disclaimer section of the Sample Disclaimer Detail page, click New.
   b. Complete the fields in the Related Disclaimer section.

      For information on Related Disclaimer fields, see Sample Disclaimer Fields (on page 602).
   c. Save the related disclaimer record.
   d. Create additional, related disclaimer records for the sample disclaimer as required.

Marking a Related Disclaimer as the Default

For multilingual sample disclaimers, you must select one related disclaimer record as the default. Only one related disclaimer can be marked as the default.

Before you begin. To create a multilingual sample disclaimer, your user role must include the Enable Basic Samples Operations privilege.

To mark a related disclaimer as the default

- In a Sample Disclaimer Detail page, use the Lookup selector for the Language field to select the default language.

  The available languages are derived from the languages that are specified in the Related Disclaimer child records

Activating a Sample Disclaimer

All sample disclaimer records are automatically assigned a status of Inactive when they are created. When all the text in a sample disclaimer record is defined and approved by the appropriate departments within your company, then you can activate the sample disclaimer record.

Restrictions That Apply to Sample Disclaimers

The following restrictions apply to sample disclaimers:

- Any new disclaimer that you create either by clicking New or Copy remains inactive until it is activated when you click the Activate button.

- After a sample disclaimer has been activated, it becomes read-only. You can only copy the active disclaimer by using the Copy link for the disclaimer listed on the Sample Disclaimer List page. If a business process for sample disclaimers is configured, then you receive an error message if you click the Edit and Delete links. If a disclaimer is inactive, then the Edit and Delete links on the Sample Disclaimer List page are active. Activating a new disclaimer renders the duplicate active disclaimer as expired because the duplicate becomes outdated.
- You cannot update the status of a disclaimer manually. If you try to manually update the status, then you receive an error message.
- Sales representatives, physicians, and other health care professionals can view the sample disclaimer that is currently active during the signature-capture process.

Restrictions That Apply to Global Sample Disclaimers

The following restrictions apply:

- Only one sample disclaimer can be active at the same time.
- The Disclaimer Text field for the disclaimer must contain content. If the field is empty, then you receive an error message when you try to activate the disclaimer.

Restrictions That Apply to Multilingual Sample Disclaimers

The following restrictions apply:

- The sample disclaimer must contain at least one child related disclaimer record and a valid, default related disclaimer record before you activate the disclaimer.
- More than one set of multilingual disclaimers can be active at the same time. The number of multilingual disclaimers that can be active is not limited. However, only a single multilingual disclaimer can be active for each country.
- If you try to activate a new sample disclaimer that defaults to global, then Oracle CRM On Demand issues a warning that you are attempting to replace one or more multilingual sample disclaimers with a single global sample disclaimer. If you continue to activate this sample disclaimer, then Oracle CRM On Demand expires all active disclaimers.
- For inactive disclaimers, if the default related disclaimer record is deleted, then you are required to choose a new default related disclaimer. If you do not, then you receive an error message requiring you to select a default language before you activate the disclaimer.
- If your company administrator configures a business process for sample disclaimers, then the following restrictions apply:
  - For an active or expired sample disclaimer, the related information section becomes read-only. Attempting to edit, delete, or create a related disclaimer generates an error in Oracle CRM On Demand.
  - You cannot make changes to or delete an expired or currently active sample disclaimer or its related disclaimers. However, you can edit these records if a business process for sample disclaimers has not been set up.

    For more information on setting up a business process for sample disclaimers, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Before you begin. To activate sample disclaimers, your user role must include the Enable Basic Samples Operations privilege.

To activate a sample disclaimer record

1. On the Sample Disclaimer List page, click the relationship code for sample disclaimer record that you want to activate. You must select a sample disclaimer record that has a status of Inactive.
2. On the Sample Disclaimer Detail page, click Activate to activate the sample disclaimer record.

   Activating the sample disclaimer does the following:

- Sets the start date for the newly activated sample disclaimer and the end date for the previously active sample disclaimer (if there was one)
- Sets the status of the previously active sample disclaimer to Expired, and changes the relationship code accordingly
- For multilingual sample disclaimers, activates all related disclaimer records that are listed in the Related Disclaimers sections

Converting Global Disclaimers to Multilingual Disclaimers

If your company is using global sample disclaimers and decides to use multilingual sample disclaimers, then complete the following procedure.

TIP: Before you begin the conversion, ensure that the global disclaimer text has been translated into the languages that are required for your company by using an external translation service, and that the translated disclaimer text is available for you to enter as related disclaimer text.

NOTE: This procedure applies to inactive global disclaimers only. For global disclaimers with any other status, business process configuration prevents you from editing disclaimer records.

Before you begin. To create a multilingual sample disclaimer, your user role must include the Enable Basic Samples Operations privilege, your company administrator must set up the page layouts for multilingual sample disclaimers, and the disclaimers must be inactive. All disclaimer text must be translated into the required languages for the sample disclaimer, typically by an external translation service.

To convert a global disclaimer to a multilingual disclaimers

1. From the Recently Modified Global Sample Disclaimers list, click an active global disclaimer that you want to convert, and note the disclaimer text for reference.
2. Copy the global sample disclaimer.

   The new disclaimer that is copied is inactive by default.
3. To convert the copied global disclaimer record to a multilingual disclaimer record, select Multilingual for the Type field, and then select the country from the Country selector.

   NOTE: Your company administrator must make this field accessible because it is not available by default.
4. Save the Sample Disclaimer record.

   Oracle CRM On Demand creates the new sample disclaimer record with a status set to Inactive.
5. Complete the Related Disclaimer section containing the translated disclaimer text for the Sample Disclaimer:
   a. In the Related Disclaimer section of the Sample Disclaimer Detail page, click New.
   b. Complete the fields in the Related Disclaimer section.

      For more information on Related Disclaimer fields, see Sample Disclaimer fields.
   c. Save the Related Disclaimer record.
   d. Create additional Related Disclaimer records for the Sample Disclaimer as required.
6. In the parent Sample Disclaimer record, select the default language from the Language selector, and save the record.
7. Convert additional, global disclaimers to multilingual disclaimers as required.

Sample Disclaimer Fields

Use the Sample Disclaimer Edit page to create a sample disclaimer, or update details for an existing sample disclaimer. The Sample Disclaimer Edit page shows the complete set of fields for a sample disclaimer.

TIP: You can also edit sample disclaimers on the Sample Disclaimer List page and the Sample Disclaimer Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the sample disclaimer fields.

Field	Description
Key Disclaimer Information	
Disclaimer Text	(Global disclaimer type only.) The disclaimer text that you want to insert for a global disclaimer. This field has a maximum of 1000 characters.
Relationship Code	A calculated value that identifies a sample disclaimer. This field is automatically populated as follows: ■ For global disclaimers, Oracle CRM On Demand sets the value by using a concatenation of the Status and Created fields (<*Status*>_<*Created*>), for example, Active_7/5/2012 01:36:09. ■ For multilingual disclaimers, Oracle CRM On Demand sets the value by using a concatenation of the Country, Status, Created, and Language fields (<*Country*>_<*Status*>_<*Created*>_<*Language*>), for example, USA_Active_7/5/2012 01:36:09_English_American.
Type	Indicates the disclaimer type. The type can be one of the following: ■ **Global.** The disclaimer contains one disclaimer text record that applies globally to the company. Global disclaimers are the default type. ■ **Multilingual.** The disclaimer contains multilingual disclaimer text records that can be used globally in the company. **NOTE:** This field is not available by default. For multilingual sample disclaimers, your company administrator changes the default value to Multilingual by using the field setup but typically does not make this field accessible to users. For more information on setting up this field and the Sample Disclaimer page layouts, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
Status	The status of the disclaimer text, which can be one of the following values: ■ **Inactive.** All sample disclaimer records have a status of Inactive when they are created. ■ **Active.** When a sample disclaimer record is activated, its status changes to Active. For global sample disclaimers, only one disclaimer can be active at any point in time. For multilingual disclaimers, only one disclaimer can be active per country at any point in time ■ **Expired.** When a new sample disclaimer record is created and activated, the status of the previously active sample disclaimer record changes to Expired. **NOTE:** This field is updated only when you click the Activate button on a sample disclaimer. You cannot update this field manually in the user interface or through Web services.
Start Date	The date when the disclaimer becomes active.

Field	Description
	This field remains blank when a sample disclaimer record is created. After the sample disclaimer record is activated, Oracle CRM On Demand populates this field with the current date.
Country	(Multilingual disclaimer type only.) The country that is used to group a set of unique, legal disclaimer texts, which have been translated into one or more languages. The disclaimer text child records are contained in the Disclaimer Text section of a multilingual Sample Disclaimer Detail page. This field is required for activating multilingual disclaimers.
Language	(Multilingual disclaimer type only.) The default language for a multilingual sample disclaimer, for example, English-American. Use the Lookup selector to select the default language. The available languages depend on the languages in the Related Disclaimer records.
End Date	The date when the disclaimer expires. This field remains blank when a sample disclaimer record is created. When Oracle CRM On Demand changes the status of a disclaimer record to Expired, it populates this field with the date.
Description	
Comments	General comments associated with the disclaimer. You can add comments only to inactive sample disclaimers.
Record Information	
Created	The user that created the Sample Disclaimer record, along with the date and timestamp when created.
Modified	The user that modified the Sample Disclaimer record, along with the date and timestamp when modified.
NOTE: For information on the related disclaimer child records, see Related Disclaimer Fields (on page 604).	

Related Information

See the following topics for related information about sample disclaimers:

- Sample Disclaimers (on page 597)
- Working with the Sample Disclaimer Homepage (on page 597)
- Managing Sample Disclaimers (on page 599)
- Related Disclaimer Fields (on page 604)

Related Disclaimer Fields

Use the Related Disclaimer Edit page to create a related disclaimer or to update details for an existing related disclaimer. The Related Disclaimer Edit page shows the complete set of fields for a related disclaimer. Related disclaimers are child records of a sample disclaimer.

NOTE: Related disclaimers apply only to multilingual disclaimers.

The Related Disclaimers section in a multilingual sample disclaimer contains the set of related disclaimers for a particular country. Any changes that you make to the related disclaimer updates the value for the Modified field on the parent sample disclaimer record. If a business process for a sample disclaimer is configured, then you can create a new, related disclaimer, or you can edit an existing one until the parent record is activated. At this point, the entire disclaimer, including its related disclaimers, becomes read-only.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the related disclaimer fields.

Field	Description
Key Disclaimer Information	
Disclaimer Text	The disclaimer text that you want to insert, in the appropriate language. **NOTE:** Oracle CRM On Demand customers must translate disclaimer texts into the languages that they require. Oracle CRM On Demand does not translate this text. This field has a maximum of 1000 characters. It is a required field.
Language	The language for the disclaimer text, for example, Spanish. Select the language by using the Language selector. This field must have a unique value for each related disclaimer; that is, different related disclaimers must contain different language settings. Adding a duplicate value in this field results in an error message. This field is required.
Default Language	The default language for a multilingual sample disclaimer, for example, English-American. Selecting the default language for a related disclaimer sets the default language for the sample disclaimer.
Record Information	
Created	The user who created the Related Disclaimer record, along with the date and timestamp when created.
Modified	The user who modified the Related Disclaimer record, along with the date and timestamp when modified.

Related Information

See the following topics for related information about sample disclaimers:

- Sample Disclaimers (on page 597)
- Working with the Sample Disclaimer Homepage (on page 597)
- Managing Sample Disclaimers (on page 599)
- Sample Disclaimer Fields (on page 602)

Sample Requests

Use the Sample Request pages to create, update, and manage requests for product samples during a sales call, for example, when a pharmaceutical sales representative drops product samples to a physician.

A *sample request* is a mechanism for sales representatives to place orders for product samples on behalf of physicians or other health care providers. A sample request includes one or more sample request items, with each sample request item representing a product sample that has been requested.

Oracle CRM On Demand process administration supports sample requests because a sample request is part of a call activity that requires a signature, and includes sample requests within call activity locking. Sample requests have their own rules to allow the locking of the sample request items. For more information on process administration, see Process Administration Functionality (on page 1483). For recommendations on how to set up the locking rules for sample request, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Sample Request Requirements

Sample requests must meet the following requirements, otherwise they cannot be submitted after they are created:

- A sample request must have a contact with a valid address.
- A sample request must have at least one sample request line item showing a positive number.
- Process administration for sample requests must be set up as described in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition* so that record locking occurs.

Sample Request Restrictions

Sample requests have the following restrictions:

- Only one sample request is allowed for a call; that is, an account, contact, or attendee call.
- After a sample request is set to Signed, the only field that you can edit is the Status field.
- If you want to lock a sample request record, then your administrator must configure a field-level process-administration rule that locks all the sample request item fields except the Status field. The Status field can change from Signed to Voided, or Signed to Approved to Back Ordered to Fulfilled. You can track these changes in status by asking your administrator to configure a process to fetch those changes in status to Oracle CRM On Demand Life Sciences Edition. For more information on setting up process locking, see *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

About Linking Sample Request Information to Calls

Before Oracle CRM On Demand Release 22, it was possible to insert a sample request item record without an associated parent sample request record by using Web services or the Import function. However, for Release 22 and later, when inserting sample request item records by using Web services or the Import function, you must provide the sample request ID of the parent to provide the context for the sample request item. From the Oracle CRM On Demand user interface, you can create a sample request item only from a parent sample request in the context of a call. In addition, product-blocking rules are not followed when sample request items are inserted or updated using Web services or the Import function.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking Sample Request information, then the Sample Request tab might be excluded from your setup.

Working with the Sample Request Homepage

The Sample Request Homepage is the starting point for managing sample request records.

NOTE: Your company administrator can customize the layout of your Sample Request Homepage. In addition, if your user role includes the Personalize Homepages privilege, then you can add sections to the page, and remove sections from the page.

Before you begin. To work with sample requests, your user role must include the Enable Basic Samples Operations privilege.

Creating a Sample Request

You can create a new sample request by clicking the New button in the Recently Modified Sample Requests section. For more information, see Creating Records (on page 51) and Sample Request Fields (on page 608).

Working with Sample Request Lists

The Sample Request Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for sample requests.

Sample Request List	Filters
All Sample Requests	All sample requests to which you have visibility, regardless of who owns the sample request.
Recently Modified Sample Requests	All sample requests that have been modified recently, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Sample Requests

The Recently Modified Sample Requests section shows the sample requests that you viewed most recently.

Click Show Full List to expand the list.

Adding Sections to Your Sample Request Homepage

If your user role includes the Personalize Homepages privilege, then you can add some or all of the following sections to your Sample Request Homepage:

- Recently Created Sample Requests
- Recently Modified Sample Requests
- My Recently Created Sample Requests
- My Recently Modified Sample Requests
- Additional report sections (Your company administrator can make report sections available for display on your Sample Request Homepage.)

To add sections to your Sample Request Homepage

1. On the Sample Request Homepage, click Edit Layout.
2. On the Sample Request Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about sample requests:

- Sample Requests (on page 606)
- Sample Request Fields (on page 608)
- Managing Sample Requests (on page 608)
- About the Automatic Population of Sample Request Fields (on page 610)
- Linking Sample Request Information to Calls (on page 570)

Managing Sample Requests

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Viewing Audit Trails for Records (on page 175)
- Sharing Records (Teams) (on page 146)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Sample Request Fields

Use the Sample Request Edit page to add a sample request or update the details for an existing sample request. The Sample Request Edit page shows the complete set of fields for a sample request.

TIP: You can also edit sample requests on the Sample Request List page and the Sample Request Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the sample request fields.

Field	Description
Key Sample Request Information	
Order Number	A unique number that is assigned to each sample request order. Oracle CRM On Demand generates this number.
Type	The Sample Request category. The default value for Type for a sample request record is Sample Request. You can choose the following values by using the picklist: Sample Request and Order. **NOTE:** Your company administrator must set up this editable field to be available on the page layout because it is not available on the page layout by default.

Field	Description
Account	The account that is associated with the sample request order. This field is automatically populated. For more information, see About the Automatic Population of Sample Request Fields (on page 610).
Contact	(Required) The contact that is associated with the sample request order. This field is automatically populated if the sample request is created from a call. For more information, see About the Automatic Population of Sample Request Fields (on page 610). This field must be completed to create a sample request order. For more information, see Linking Sample Request Information to Calls (on page 570).
Order Created	The date on which the sample request order was created.
Shipping Address	(Required) The address to which the sample request order will be shipped. You must select a contact or account before you can select an address. The address can be a non-shared address or a shared address that has been validated. This field is automatically populated if the sample request is created from a call. For more information, see About the Automatic Population of Sample Request Fields (on page 610). This field must be completed to create a sample request order. For more information, see Linking Sample Request Information to Calls (on page 570).
Status	The default value for this field is Pending. When you submit a sample request order for products, the value in this field changes to Submitted. The possible values for this field are: - Back Ordered - Booked - Created - Entered - Failed - In Progress - Pending - Processed - Received - Rejected - Shipped - Signed - Submitted - Voided
Additional Information	
Owner	The person who created this sample request order record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Field	Description
Created	The date and time when the sample request record was created.
Modified	The date and time when the sample request record was last modified.
Available Section	
Description	(Optional) A description of the order.

Related Information

See the following topics for related information about sample requests:

- Sample Requests (on page 606)
- Working with the Sample Request Homepage (on page 606)
- Managing Sample Requests (on page 608)
- About the Automatic Population of Sample Request Fields (on page 610)
- Linking Sample Request Information to Calls (on page 570)

About the Automatic Population of Sample Request Fields

Oracle CRM On Demand populates the Account, Contact, and Shipping Address fields automatically when you create the sample request from an account call or a contact call.

NOTE: In the following cases, you can use the Lookup icon to override the value that Oracle CRM On Demand selects.

If you create a sample request from an account call, then Oracle CRM On Demand populates the following fields as follows:

- **Account.** Oracle CRM On Demand populates this field with the account name from the parent account call.
- **Contact.** Oracle CRM On Demand populates this field with the contact name from the parent account call.

  If the contact is missing from the parent account call, then Oracle CRM On Demand populates the field with the account's primary contact. If a primary contact does not exist for the account, then Oracle CRM On Demand displays an error message if you try to save the record.
- **Shipping Address.** Oracle CRM On Demand populates this field with the contact's primary address from the parent account call.

  If the contact's primary address is missing from the parent account call, then Oracle CRM On Demand populates this field with the account's shipping address. If the account's shipping address is missing, then Oracle CRM On Demand leaves this field empty. However, if you try to save the record, then Oracle CRM On Demand displays an error message.

If you create a sample request from a contact call or attendee call, then Oracle CRM On Demand populates the following fields as follows:

- **Account.** Oracle CRM On Demand populates this field with the account name from the parent contact call or attendee call.

  If the account is missing from the parent contact call or attendee call, then Oracle CRM On Demand populates the field with the contact's primary account. If the contact has no primary account, then Oracle CRM On Demand leaves the account field empty.
- **Contact.** Oracle CRM On Demand populates this field with the contact name from the parent contact call or attendee call.

- **Shipping Address.** Oracle CRM On Demand populates this field with the contact's primary address from the parent contact call or attendee call.

  If the contact's primary address is missing from the parent contact call or attendee call, then Oracle CRM On Demand populates this field with the account's shipping address. If the account's shipping address is missing, then Oracle CRM On Demand leaves this field empty. However, if you try to save the record, then Oracle CRM On Demand displays an error message.

Personalized Content Delivery

This topic introduces the Personalized Content Delivery (PCD) features available with Oracle CRM On Demand Life Sciences Edition.

About Personalized Content Delivery

Personalized Content Delivery (PCD) is Oracle's closed-loop marketing solution for electronic detailing presentations. PCD enables sales and marketing organizations to manage digital content, create messaging plans, and distribute these messaging plans to the field sales force. Sales organizations can then deliver tailored presentations to customers while automatically capturing customer response metrics to be passed back to the marketing organization for closed loop analysis. PCD is required for delivering presentations and capturing customer-response metrics.

Scenario for Using PCD

Oracle CRM On Demand PCD enables users to:

- Manage digital content
- Manage Messaging Plans
- Store Customer Responses to Messaging Plans

The intended users of the Oracle CRM On Demand PCD solution are product managers, sales operations managers, and others who develop collateral for use by a sales force.

The following scenario provides an overview of how the PCD functionality is intended to be used:

1. Manage Digital Content

   Digital content (graphics files) are first attached to a solution record. While PCD supports a wide range of graphic formats, the most common format is a SWF file, which enables rich media presentations. A corresponding thumbnail image (typically a PNG, GIF, or JPG file) would also be attached to the same solution record to provide for a compact graphical representation of the larger media file. The solution record includes fields for metadata about the attached file, such as expiration date, and whether it has received marketing and legal approval.

   To set up solution records, see Solutions (on page 404).

2. Manage Messaging Plans

   After attaching graphics files to Solution records, users create messaging plans, consisting of a collection of media files arranged to communicate a sales message. Users specify a sequence of messaging plan items that make up a messaging plan. Each messaging plan item corresponds to a Solution record and its associated digital content, and also includes related media files that a presenter can use to go into more detail on a given topic. Whereas a Solution record consists of a digital media file that can be used for multiple messaging plans, a messaging plan item represents a unique instance of a given Solution media file, with metadata specific to the use of a media file for a particular messaging plan.

   To set up a messaging plan and its associated records, see Messaging Plans (on page 612), Messaging Plan Items (on page 618), and Messaging Plan Item Relations (on page 624).

3. Store Customer Response to Messaging Plans

   Messaging Plans are delivered in an application external to Oracle CRM On Demand. Oracle CRM On Demand receives audience feedback from the external application and stores this information. Such feedback is stored for discrete periods in the delivery of the messaging plan and can also be associated with predefined responses.

To set up message responses, see Adjusting Message Responses (on page 216).

Messaging Plans

Use the Messaging Plan pages to create, update, and track messaging plans.

A *messaging plan* is a presentation delivered using a personal computer or tablet computer. Sales users use a messaging plan to describe products and track customer feedback. The messaging plan pages capture various attributes of a messaging plan, such as the product it covers, the expiration date of the messaging plan, and other parameters.

Brand managers, product managers, and sales operation managers create messaging plans. Messaging plans consist of a specific sequence of content, so that sales users deliver presentations that comply with company legal and marketing guidelines.

A messaging plan might contain a number of messaging plan items in a specific sequence, analogous to a traditional presentation consisting of a number of slides. Or, a messaging plan might be one slide communicating a specific message. When creating an activity, sales representatives can review the recommended messaging plans for the activity, for example, a sales call, task, or appointment, to see if there are any recommendations. Messaging plan recommendations are based on the segment matches and objective associations between the messaging plan and the sales call, task, or appointment. For more information, see Reviewing Recommended Messaging Plans for Activities (on page 614).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include the administration of messaging plan information, the messaging plan tab might be excluded from your setup. Your user role must include the Manage Personalized Content Delivery privilege to work with the messaging plan pages.

Working with the Messaging Plan Homepage

The Messaging Plan Homepage is the starting point for managing messaging plan records. This page contains several sections and displays information that is relevant to you.

NOTE: Your company administrator can customize the layout of your Messaging Plan Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Messaging Plan

You can create a new messaging plan by clicking the New button in the Recently Modified Messaging Plans section. For more information, see Creating Records (on page 51) and Messaging Plan Fields (on page 616).

Working with Messaging Plan Lists

The Messaging Plan Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for messaging plans.

Messaging Plan List	Filters
All Messaging Plans	All messaging plans to which you have visibility, regardless of who owns the messaging plan.
Recently Modified Messaging Plans	All messaging plans with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Messaging Plans

The Recently Modified Messaging Plans section shows the messaging plans that you modified most recently.

Click the Show Full List link to expand the list.

Adding Sections to Your Messaging Plan Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Messaging Plan Homepage:

- Recently Created Messaging plans
- Recently Modified Messaging plans
- My Recently Created Messaging plans
- My Recently Modified Messaging plans
- Additional report sections (Your company administrator can make report sections available for display on your messaging plan Homepage.)

To add sections to your Messaging Plan Homepage

1. On the Messaging plan Homepage, click Edit Layout.
2. On the Messaging plan Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page. Then click Save.

Managing Messaging Plans

For step-by-step procedures for managing messaging plans, see:

- Adding Books to a Messaging Plan (on page 614)
- Adding Messaging Plan Items (on page 614)
- Reviewing Recommended Messaging Plans for Activities (see Reviewing Recommended Messaging Plans for Activities on page 614)
- Creating Message Responses from a Messaging Plan (on page 615)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: The messaging plans feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about messaging plans:

- Messaging Plans (on page 612)
- Working with the Messaging Plan Homepage (on page 612)
- Messaging Plan Fields (on page 616)

NOTE: Your user role must include the Manage Personalized Content Delivery privilege to work with the Messaging Plan pages.

Adding Books to a Messaging Plan

Use the following procedure to add books to a messaging plan. When you add a book to a messaging plan, you can then modify or remove the book. This procedure assumes that the book is exposed as a related item on the Messaging Plan Detail page. For more information about exposing related items, see Customizing Related Item Layouts (on page 1258).

To add a book to a messaging plan

1. On the Messaging Plan List page, open the messaging plan that you want.
2. On the Messaging Plan Detail page, click Add in the Books section of the page.
3. In the book selector, choose the book that you want to add to the messaging plan, and then click OK.

   For more information about books, see Book Management (on page 1421).

Adding Messaging Plan Items

You can add a messaging plan item to a messaging plan. A messaging plan item contains information about the items that make up a messaging plan. For more information on messaging plan items, see Messaging Plan Items (on page 618).

NOTE: If you do not see the Messaging Plan Item Relations related item section in your Contact Detail page, add this related item section, as described in Customizing Related Item Layouts (on page 1258), or contact your company administrator.

To add a messaging plan item to a messaging plan

1. From the Messaging Plan Detail page, scroll to the Messaging Plan Item section and click New.
2. Complete the fields as described in Messaging Plan Item Fields (on page 621). Then save the record.

Reviewing Recommended Messaging Plans for Activities

During activity creation, sales representatives can record information about the account, contact, or product associated with the activity. Sales representatives can also review the recommended messaging plans for the activity (sales call, task, or appointment) if there are any recommendations. Messaging plan recommendations are based on segment matches and objective associations between the messaging plan and the sales call, task, or appointment as follows:

- If the primary or secondary segment of a messaging plan matches the segment specified for the contact, then the Recommendation field for the messaging plan in the Available Message Plans section on the Call Detail page is populated with a full gold star.

- If the primary or secondary objective of a messaging plan matches the objective specified for the activity, then the Recommendation field for the messaging plan in the Available Message Plans section on the Call Detail page is populated with a half gold star.
- If there are no segment or objective matches between the messaging plan and the contact or activity, then the Recommendation field for the messaging plan in the Available Message Plans section on the Call Detail page is populated with an empty white star.

For more information about sales calls, see Tracking Visits (Sales Calls) to Customers (on page 208) and Dropping Samples During a Sales Call (on page 558). For more information about activities, see Calendar and Activities (on page 189).

Use the following procedure to review the recommended messaging plans for activities.

To review recommended messaging plans for activities

1. Select the activity for your visit.

   For instruction on selecting activities, see Finding Records. (see Finding Records on page 74)
2. On the Detail page (Call, Task, or Appointment Detail) for the activity, scroll down to the Calls section, and open the sales call that you want to review.
3. On the Call Detail page, scroll down to the Available Message Plans section, and review the list of messaging plans as follows:
   - A full gold star in the Recommendation field indicates a segment match between the messaging plan and the contact.
   - A half gold star in the Recommendation field indicates a match of objectives between the messaging plan and the activity.
   - An empty white star in the Recommendation field indicates that there is no match (segment or objectives) between the messaging plan and the activity.
4. Click the message plan name link to open and review the messaging plan.

Creating Message Responses from a Messaging Plan

You can add a message response to a messaging plan. A *message response* is feedback received from the audience during the presentation of a messaging plan during a particular period. For more information on message responses, see Adjusting Message Responses (on page 216).

NOTE: Create a message response from a messaging plan or a messaging plan item only if you have repurposed the page layouts for these records using structured product messaging page layouts (that is, the message response has been repurposed as an outcome, the messaging plan is repurposed as a call plan, and so on). With structured product messaging, pharmaceutical sales representatives can choose from a set of standard responses such as *Requested more information*, *Positive reaction*, and so on. For more information on how these record types are repurposed, see Structured Product Messaging (on page 627).

Before you begin. Your user role must include the Manage Personalized Content Delivery privilege to work with the Message Response pages and your company administrator must add in the Message Responses related information section to the Messaging Plan Detail page.

To create a Message Response from a Messaging Plan

1. If you do not see the Message Responses related information section in your Messaging Plan Detail page, add this related information section, as described in Customizing Related Item Layouts (on page 1258), or contact your company administrator.
2. From the Messaging Plan Detail page, scroll to the Message Responses related information section and click New.

3 Complete the fields as described in Adjusting Message Responses (on page 216).

4 Save the Message Response record.

Messaging Plan Fields

Use the Messaging Plan Edit page to add a messaging plan, or update details for an existing messaging plan. The Messaging Plan Edit page shows the complete set of fields for a messaging plan.

TIP: You can also edit messaging plans on the Messaging Plan List page and the Messaging Plan Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the messaging plan fields.

Field	Description
Key Messaging Plan Information	
Name	The name of the messaging plan. (Required.)
Type	The messaging plan category. Use the picklist to choose the type. (Required.) The default values for Type are Product Launch, Targeted Message, Signature, and Call Objective Plan. Selecting a type can result in a different page layout from the default page layout for messaging plans if your administrator has set up dynamic page layouts for this record type. For example, selecting Call Objective Plan can result in a Call Objective page layout if your company administrator has set up dynamic page layouts. For more information on setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts (on page 1314), and also see the topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
Product	The product associated with this messaging plan. Use the Lookup icon to select a product. (Required.) **NOTE:** The Product field value on the child Messaging Plan Item, Messaging Plan Item Relations, and Message Response records must be the same as the Product value for the parent Messaging Plan. However, Oracle CRM On Demand does not enforce this requirement. You must manually ensure this value is the same on all the child PCD records as this parent Messaging Plan, or else you encounter data integrity issues. For example, if you have Product set to AAAA in the Messaging Plan and you update the Product field for a Messaging Plan Item using Web services from AAAA to BBBB, then the Messaging Plan Item would inaccurately describe product BBBB instead of product AAAA.
Code	A free-text field that can be used to classify a messaging plan by intent, therapeutic area, or other organizationally defined classification.
Status	The current status of the messaging plan. Possible status values are: Approved, In Progress, Rejected, Released, or Submitted. Use the picklist to select a status. (Required.)
Verify	Indicates that each constituent messaging plan item of the messaging plan has been verified to display properly and consequently has a verification status of Successful. If all the constituent messaging plan items have a verification status value of Successful, the Verify field

Field	Description
	is set to a value of Successful. Otherwise, the value is set to Failed. This field is set automatically by Oracle CRM On Demand.
Segment	The market segment (that is, the group of accounts) at which the messaging plan is targeted.
NOTE: The Primary Target Objective, Primary Segment, Secondary Target Objective, and Secondary Segment fields are not available by default. To add these fields to the Messaging Plan Detail page, contact your company administrator.	
Primary Target Objective	Indicates the first objective of this messaging plan. Enter your objective, or click the Lookup icon, and select an objective from the list.
Primary Segment	Indicates the primary segment to associate with this messaging plan. The options are: White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Pentamillionaires, and Ultra-High Net Worth.
Secondary Target Objective	Indicates the second objective of this messaging plan. Enter your objective, or click the Lookup icon, and select an objective from the list. **NOTE:** An error message is displayed when the primary objective and secondary objective are the same, and if a secondary objective is selected without a primary objective.
Secondary Segment	Indicates the secondary segment to associate with this messaging plan. The options are: White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Pentamillionaires, and Ultra-High Net Worth. **NOTE:** An error message is displayed when the primary segment and secondary segment are the same, and if a secondary segment is selected without a primary segment.
Owner	(Required.) The user who owns the messaging plan record. By default, this field is set to the user who created the messaging plan. Use the Lookup icon to change the owner.
Start Date	The date when the messaging plan becomes visible (MM/DD/YYYY). Use the Calendar icon to select the date.
Expiration Date	The date when the messaging plan is deactivated (MM/DD/YYYY). Use the Calendar icon to select the date.
Release Date	The date when this content can be used in Personal Content Delivery (PCD), (MM/DD/YYYY). Use the Calendar icon to select the date.
Disclosure Mandatory	This check box indicates that a disclosure message must be presented at the beginning of this messaging plan. (Required.)
Enable Followup	This check box is intended for future use.
Lock Sequence	This check box is not used in the current release of Oracle CRM On Demand. (Required.)

Field	Description
Product Indication	A combination of a symptom or malady and the specific product or drug that alleviates the symptom or malady. Typically, a pharmaceutical sales representative details the product indication during a call with a health practitioner. For more information, see Product Indications (on page 633). **NOTE:** This field is not set up by default. If you require this field, then contact your company administrator to set it up.
Additional Messaging Plan Information	
Audience	The description of the targeted audience for this messaging plan.
Comment	Any general comments on this messaging plan.
Description	The description of this messaging plan record.
NOTE: The following fields are used only with the Oracle CRM On Demand Disconnected Mobile Sales application, and do not appear by default. They must be set up by your company administrator.	
Disable Navigation	Select this check box to disable the forward and backward buttons in the electronic detailer application for Oracle CRM On Demand Disconnected Mobile Sales, where customers implement their own navigation. The check box is deselected by default.
Disable Response	Select this check box to indicate that message responses are disabled for this message plan. The check box is deselected by default.
Default Menu Bar Control	Select this check box to indicate the use of the default tap menu bar in the electronic detailer application for Oracle CRM On Demand Disconnected Mobile Sales. The check box is deselected by default.

Related Information

See the following topics for related messaging plan information:

- Messaging Plans (on page 612)
- Working with the Messaging Plan Homepage (on page 612)
- Managing Messaging Plans (on page 613)

Messaging Plan Items

Use the Messaging Plan Item pages to create, update, and track messaging plan items.

A *messaging plan item* contains information about the items that make up a messaging plan. These items that make up a messaging plan are in a specific sequence, analogous to a traditional presentation consisting of a number of slides.

A *solution* is the multimedia content and graphic files (such as SWF, GIF or JPEG files) used in presentations that underlie a messaging plan item. While a solution can be reused, a messaging plan item is unique to a single messaging plan. The Messaging Plan Item page contains additional attribute information beyond what is associated with a solution.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking messaging plan item information, the Messaging Plan Item tab might be excluded from your setup. Your user role must include the Manage Personalized Content Delivery privilege to work with the Messaging Plan Item pages.

Working with the Messaging Plan Item Homepage

The Messaging Plan Item Homepage is the starting point for managing messaging plan item records. This page displays information that is relevant to you.

NOTE: Your company administrator can customize the layout of your Messaging Plan Item Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Messaging Plan Item

You can create a new messaging plan item by clicking the New button in the Recently Modified Messaging Plan Items section. For more information, see Creating Records (on page 51) and Messaging Plan Item Fields (on page 621).

Working with Messaging Plan Item Lists

The Messaging Plan Item Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for messaging plan items.

Messaging Plan Item List	Filters
All Messaging Plan Items	All messaging plan items to which you have visibility, regardless of who owns the messaging plan items.
Recently Modified Messaging Plan Items	All messaging plan items with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Messaging Plan Items

The Recently Modified Messaging Plan Items section shows the messaging plan items you modified most recently.

Click Show Full List to expand the list.

Adding Sections to your Messaging Plan Item Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Messaging Plan Item Homepage:

- Recently Created Messaging Plan Items
- Recently Modified Messaging Plan Items
- My Recently Created Messaging Plan Items
- My Recently Modified Messaging Plan Items

- Additional report sections (your company administrator can make report sections available for display on your Messaging Plan Item Homepage)

To add sections to your Messaging Plan Item Homepage

1. On the Messaging Plan Item Homepage, click Edit Layout.
2. On the Messaging Plan Item Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page. Click Save.

Managing Messaging Plan Items

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Adding Messaging Plan Item Relations (on page 620)
- Creating Message Responses from a Messaging Plan Item (on page 621)

NOTE: The messaging plan item feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about messaging plan items:

- Messaging Plan Items (on page 618)
- Working with the Messaging Plan Item Homepage (on page 619)
- Messaging Plan Item Fields (on page 621)

NOTE: Your user role must include the Manage Personalized Content Delivery privilege to work with the Messaging Plan Item pages.

Adding Messaging Plan Item Relations

You can add a messaging plan item relation to a messaging plan item. A *messaging plan item relation* is a presentation item that provides optional information to support the primary messaging plan item. For example, if the main item shows the side effects for a new drug, optional related information might show the side effects of an older class of drugs. If the theme from the main item is that a clinical trial had good results, optional details might show numbers from the clinical trial. For more information on messaging plan item relations, see Messaging Plan Item Relations (on page 624).

NOTE: If you do not see the Messaging Plan Item Relations related item section in your Contact Detail page, add this related item section, as described in Customizing Related Item Layouts (on page 1258), or contact your company administrator.

To add a messaging plan item relation to a messaging plan item

1 From the Messaging Plan Item Detail page, scroll to the Messaging Plan Item Relation section, and click New.
2 Complete the fields, as described in Messaging Plan Item Relations Fields (on page 626). Save the record.

Creating Message Responses from a Messaging Plan Item

You can add a message response to a messaging plan item. A *message response* is feedback received from the audience during the presentation of a messaging plan during a particular period. For more information on message responses, see Adjusting Message Responses (on page 216).

NOTE: Create a message response from a messaging plan or a messaging plan item only if you have repurposed the page layouts for these records using structured product messaging page layouts (that is, the message response has been repurposed as an outcome, the messaging plan is repurposed as a call plan, and so on). With structured product messaging, pharmaceutical sales representatives can choose from a set of standard responses such as *Requested more information*, *Positive reaction*, and so on. For more information on how these record types are repurposed, see Structured Product Messaging (on page 627).

Before you begin. Your user role must include the Manage Personalized Content Delivery privilege to work with the Message Response pages and your company administrator must add in the Message Responses related information section to the Messaging Plan Item Detail page.

To create a Message Response from a Messaging Plan Item

1 If you do not see the Message Responses related information section in your Messaging Plan Item Detail page, add this related information section, as described in Customizing Related Item Layouts (on page 1258), or contact your company administrator.
2 From the Messaging Plan Item Detail page, scroll to the Message Responses related information section and click New.
3 Complete the fields as described in Adjusting Message Responses (on page 216).
4 Save the Message Response record.

Messaging Plan Item Fields

Use the Messaging Plan Item Edit page to add a messaging plan item, or update details for an existing messaging plan item. The Messaging Plan Item Edit page shows the complete set of fields for a messaging plan item.

TIP: You can also edit messaging plan items on the Messaging Plan Item List page and the Messaging Plan Item Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some of the Messaging Plan Item fields.

Field	Description
Key Messaging Plan Item Information	
Sequence Number	The order in which this messaging plan item occurs within the messaging plan. (Required.)
Name	The name of the messaging plan item.
Display Name	The name with which the messaging plan item is displayed in a messaging plan.

Field	Description
Product	The product associated with the parent messaging plan. Use the Lookup icon to select a product. (Required.) **NOTE:** The Product field value must be the same as the parent Messaging Plan record. However, Oracle CRM On Demand does not enforce this requirement. You must ensure this value is the same as the parent Messaging Plan manually. If you do not, then you encounter data integrity issues. For example, if you have the Product field set to AAAA in the Messaging Plan, and if you update the Product field from AAAA to BBBB in any of the child PCD records (Messaging Plan Item, Messaging Plan Item Relations, or a Message Response) by using Web services, then the child PCD record describes product BBBB incorrectly, instead of product AAAA.
Solution Name	The name of the digital content that the messaging plan item relation is based on. Use the Lookup icon to select the solution. Before Release 23, the Solution field was a required field by default. However, for Release 23, this field is no longer required by default. However, if your company has customized the page layout for this record type that occurred before Release 23, then the Solution field remains a required field for those customized layouts. To change this field to Not Required, your company administrator must deselect the Required check box for the Solution field that was set up in the customized page layout for this record type. For more information on field setup, see Creating and Editing Fields (on page 1219).
Solution Name: Verification Status	Indicates whether digital content can be properly displayed. The possible values are: Not Verified, Successful, or Failed. (View-only) The value of this field is inherited from the linked Solution record that contains the digital content file.
Solution Name: Release Date	The date after which the solution content can be used in PCD. (View-only.)
Solution Name: Expiration Date	The date after which the solution content should not be used in PCD. (View-only.)
Disclosure Message	This check box flags a particular asset as a disclosure message. Often times, a messaging plan must be prefaced with a disclosure message or messages to ensure full disclosure of all relevant information and that all legal and regulatory guidelines are satisfied. (Required.)
Type	The messaging plan item category. Use the picklist to select a type. (Required.) The default values for Type are as follows: Message Plan Item, Attachment, Related, Detail, and Call Objective. Selecting a type can result in a different page layout from the default page layout for messaging plan items if your administrator has set up dynamic page layouts for this record type. For example, selecting Call Objective can result in a Call Objective page layout if it is set up by your administrator. For more information on setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts (on page 1314) and also see the

Field	Description
	topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
Rating	A qualitative rating of the effectiveness of this item. Use the picklist to select a rating.
Parent Messaging Plan	The messaging plan for which this messaging plan item is a component. Use the Lookup icon to select the parent messaging plan. (Required.)
Status	The current status of the messaging plan item. Use the picklist to select the status. The preconfigured choices are Hide and Show.
Description	A brief description of the content for this item.
Send Type	The type of PDF file of a sales presentation that is sent by the Oracle CRM On Demand Disconnected Mobile Sales application as an email to recipients. You can select the following send types: ■ **PDF Send.** A PDF of a full multislide presentation. ■ **Standard Send.** A PDF of only the first slide in the presentation, which is the default type. **NOTE:** This field is not available by default on the Messaging Plan Item page layout and must be added in by your administrator. For information about adding fields to page layouts, see Customizing Static Page Layouts (on page 1267).
Disable Preload	Select this field to disable preload animations for the Oracle CRM On Demand Disconnected Mobile Sales application. By default, this field is not selected and the animations are preloaded. **NOTE:** This field is not available by default on the Messaging Plan Item page layout and must be added in by your administrator. For information about adding fields to page layouts, see Customizing Static Page Layouts (on page 1267).
Message Plan Item Additional Information	
Synopsis	A brief description for the item.
Speaker Notes	Notes that you can add when presenting this item.
Audience	The targeted user for the content.

Related Topics

See the following topics for related information about messaging plan items:

- Messaging Plan Items (on page 618)
- Working with the Messaging Plan Item Homepage (on page 619)
- Managing Messaging Plan Items (on page 620)

Messaging Plan Item Relations

Use the Messaging Plan Item Relations pages to create, update, and track messaging plan item relations.

A *messaging plan item relation* is a presentation item that provides optional information to support the primary messaging plan item. For example, if the main item shows the side effects for a new drug, optional related information might show the side effects of an older class of drugs. If the theme from the main item is that a clinical trial had good results, optional details might show numbers from the clinical trial. A messaging plan is made up of a number of messaging plan items in a specific sequence, analogous to a traditional presentation consisting of a number of slides. Each messaging plan item might have related items associated with it, which are called *messaging plan item relations.* The Messaging Plan Item Relations page contains information about these supporting presentation items.

Messaging Plan Item Relations Must Be Unique

If you are setting up more than one Messaging Plan Item Relations record with the same Type value and parent Messaging Plan Item value, then the Solution field cannot be set to the same value. For example, if you attempt to create two messaging plan item relations records, MPIR1 and MPIR2, both with the Type set to Attachment, and if the parent messaging plan item record is set to MPIabc, then you must set the Solution field to different values for each messaging plan item relations record. Otherwise, Oracle CRM On Demand displays an error message.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking messaging plan item relations, the Messaging Plan Item Relations tab might be excluded from your setup. Your user role must include the Manage Personalized Content Delivery privilege to work with the Messaging Plan Item Relations pages.

Working with the Messaging Plan Item Relations Homepage

The Messaging Plan Item Relations Homepage is the starting point for managing messaging plan item relations records. This page contains several sections and displays information that is relevant to you.

NOTE: Your company administrator can customize the layout of your Messaging Plan Item Relations Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Messaging Plan Item Relation

You can create a new messaging plan item relation by clicking the New button in the Recently Modified Messaging Plan Item Relations section. For more information, see Creating Records (on page 51) and Messaging Plan Item Relations Fields (on page 626).

Working with Messaging Plan Item Relations Lists

The Messaging Plan Item Relations Lists section shows a number of filtered lists. *Filtered lists* are subsets or groups of records that allow you to limit the number of records to work with at a time.

The following table describes the standard lists for Messaging Plan Item Relations.

Messaging Plan Item Relation List	Filters
All Messaging Plan Item Relations	All messaging plan item relations to which you have visibility, regardless of who owns the messaging plan item relation.
Recently Modified Messaging Plan Item Relations	All messaging plan item relations with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Messaging Plan Item Relations

The Recently Modified Messaging Plan Item Relations section shows the messaging plan item relations you modified most recently.

Click the Show Full List link to expand the list.

Adding Sections to your Messaging Plan Item Relations Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Messaging Plan Item Relations Homepage:

- Recently Created Messaging Plan Item Relations
- Recently Modified Messaging Plan Item Relations
- My Recently Created Messaging Plan Item Relations
- My Recently Modified Messaging Plan Item Relations
- Additional report sections (Your company administrator can make report sections available for display on your Messaging Plan Item Relations Homepage.)

To add sections to your Messaging Plan Item Relations Homepage

1. On the Messaging Plan Item Relations Homepage, click Edit Layout.
2. On the Messaging Plan Item Relations Homepage Layout page, click the directional arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Messaging Plan Item Relations

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: The messaging plan item relations feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about messaging plan item relations:

- Messaging Plan Item Relations (on page 624)
- Working with the Messaging Plan Item Relations Homepage (on page 624)

- Messaging Plan Item Relations Fields (on page 626)

NOTE: Your user role must include the Manage Personalized Content Delivery privilege to work with the Messaging Plan Item Relation pages.

Messaging Plan Item Relations Fields

Use the Messaging Plan Item Relations Edit page to add a messaging plan item relation, or update details for an existing messaging plan item relation. The Messaging Plan Item Relations Edit page shows the complete set of fields for a messaging plan item relation.

TIP: You can also edit messaging plan item relations on the Messaging Plan Item Relations List page and the Messaging Plan Item Relations Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Messaging Plan Item Relations fields.

Field	Description
Key Messaging Plan Item Relations Information	
Name	The name of the messaging plan item relation.
Display Name	The name used to display the messaging plan item relation in the messaging plan.
Parent MP Item	The parent messaging plan item for which this messaging plan item relation provides the optional backup or detailed information. (Required.)
Product	The product associated with the parent messaging plan. Use the Lookup icon to select a product. (Required.) **NOTE:** The Product field value must be the same as the parent Messaging Plan record. However, Oracle CRM On Demand does not enforce this requirement. You must ensure this value is the same as the parent Messaging Plan manually. If you do not, then you encounter data integrity issues. For example, if you have the Product field set to AAAA in the Messaging Plan, and if you update the Product field from AAAA to BBBB in any of the child PCD records (Messaging Plan Item, Messaging Plan Item Relations, or a Message Response) by using Web services, then the child PCD record describes product BBBB incorrectly, instead of product AAAA.
Description	A brief description of the contents for this item.
Type	The messaging plan item relation category. Use the picklist to select a type. (Required.) The default values for Type are as follows: Message Plan Item, Attachment, Related, Detail, and Next Call Objective. Selecting a type can result in a different page layout from the default page layout for Messaging Plan Item Relations if your administrator has set up dynamic page layouts for this record type. For example, selecting Next Call Objective can result in a Next Call Objective page layout if it is

Field	Description
	set up by your administrator. For more information on setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts (on page 1314) and also see the topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.
Solution Name	The name of the multimedia or graphic file content on which the messaging plan item relation is based. Before Release 23, the Solution field was a required field by default. However, for Release 23, this field is no longer required by default. However, if your company has customized the page layout for this record type that occurred before Release 23, then the Solution field remains a required field for those customized layouts. To change this field to Not Required, your company administrator must deselect the Required check box for the Solution field that was set up in the customized page layout for this record type. For more information on field setup, see Creating and Editing Fields (on page 1219).
Synopsis	A brief description for the item.

Related Information

See the following topics for related information about messaging plan item relations:

- Messaging Plan Item Relations (on page 624)
- Working with the Messaging Plan Item Relations Homepage (on page 624)
- Managing Messaging Plan Item Relations (on page 625)

Structured Product Messaging

Structured product messaging (SPM) refers to the repurposed personalized content delivery (PCD) record types (Messaging Plan, Messaging Plan Item, Messaging Plan Item Relations, and Message Response) that an administrator sets up to enable pharmaceutical sales representatives to manage their sales call objectives. An administrator repurposes the PCD record types by defining dynamic page layouts for these records. By appropriately selecting the Type picklist field for a PCD record, a user can dynamically change the page layout corresponding to the PCD record that is being used in Oracle CRM On Demand. For example, selecting Type with a value of Call Objective changes the page layout for a Messaging Plan Item to a Call Objective page layout.

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

If you are using the default PCD record types to manage electronic detailing presentations, then see Personalized Content Delivery (see Personalized Content Delivery on page 611). In addition, to capture product detailing information during calls, using the default layouts, see Linking Product Detailed Information to Calls (on page 563).

The SPM page layouts corresponding to the PCD record types are described as follows:

- A call objective plan, which is based on the Messaging Plan record type, is a plan that packages the sales team's call objectives, next call objectives, and outcomes. The call objective plan is defined by an administrator and follows an approval path for the standard selections. The call objective plan contains the predefined metadata that the sales representative selects during a product detailing session within the context of a call (Account, Contact, or Attendee Call).

- A call objective, which is based on the Messaging Plan Item record type, is a predefined set of values that explain the purpose and goal of the visit when describing a particular product.
- A next call objective, which is based on the Messaging Plan Item Relations record type, is a predefined set of values that describe the goal and purpose of the follow-up visits and relates to a particular product.
- An outcome, which is based on the Message Response record type, is a predefined set of values that are approved for use by the administrator to report the response of the customer to the detailing session about the product.

Example of a Call Objective Plan

Consider a call objective plan defined for the product, Drug Z. The sales team might have a number of call objectives when they discuss Drug Z with customers, such as the following:

- **Call Objective 1.** Launch the Drug Z product.
- **Call Objective 2.** Introduce the benefits of Drug Z.
- **Call Objective 3.** Discuss the safe use of Drug Z.
- **Call Objective 4.** Describe the potential side effects of Drug Z.

The next call objectives might include the following:

- **Next Call Objective 1**. Describe the dosages of Drug Z.
- **Next Call Objective 2.** Review the pricing of Drug Z.
- **Next Call Objective 3.** Improve the relationship with the physician by providing samples of Drug Z.

The outcomes that describe the detailing session responses might be as follows:

- **Outcome 1.** Positive response.
- **Outcome 2.** Negative response.
- **Outcome 3.** The physician has additional questions.
- **Outcome 4**. A follow-up visit is required.
- **Outcome 5.** A follow-up visit is not required.

All of the SPM records in this example relate to the call objective plan that has been defined for the product, Drug Z. The sales representative picks the appropriate items at the time of the call in the Product Detailed related item section in the Call Detail page.

NOTE: To use SPM record types, your administrator must set up dynamic page layouts for the SPM and PCD record types. Selecting an SPM type can result in a different page layout from the default page layout for PCD records if your administrator has set up dynamic page layouts for this record type. For example, selecting a Call Objective type can result in a Call Objective page layout if it is set up by your administrator. For more information about setting up dynamic page layouts for this record type, see Specifying Dynamic Page Layouts (on page 1314) and also see the topics about page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

For more information about managing call objectives, see the following topics:

- Selecting the Structured Product Messaging Page Layouts (on page 629)
- Associating Call Objectives, Next Call Objectives, and Outcomes to Products Detailed in a Sales Call (on page 629)
- Selecting the Primary Call Objective, Primary Next Call Objective, or Primary Outcome for a Detailed Product (on page 631)

For information on how Structured Product Messaging records might be used with product indications, see Example of Using Structured Product Messaging Records and Product Indications (on page 632).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Selecting the Structured Product Messaging Page Layouts

To use the structured product messaging (SPM) page layouts to manage your call objectives during product detailing sessions, you must select the appropriate Type value to determine the dynamic page layouts for SPM.

Before you begin. Your administrator must set up dynamic page layouts for SPM as described in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*. If your administrator sets up the dynamic page layouts, then selecting an SPM type results in a different page layout from the default layout for PCD record types. For example, for a Messaging Plan Item record, selecting a Call Objective type results in a Call Objective page layout. For more information on setting up dynamic page layouts, see Specifying Dynamic Page Layouts (on page 1314). In addition, your administrator must set up your user access profile so that you have Read-Only, View, or Inherit Primary access to the related information SPM records on the Products Detailed detail page.

To select the structured product messaging page layouts

1. Navigate to the Messaging Plan Detail page, and in the Type picklist field, select Call Objective Plan to display the Call Objective Plan page layout.
2. Navigate to the Messaging Plan Item Detail page, and in the Type picklist field, select Call Objective to display the Call Objective page layout.
3. Navigate to the Messaging Plan Item Relations Detail page, and in the Type picklist field, select Next Call Objective to display the Next Call Objective page layout.
4. Navigate to the Message Response related item section in a Call Detail page, and in the Type picklist field, select Outcome to display the Outcome page layout.

Associating Call Objectives, Next Call Objectives, and Outcomes to Products Detailed in a Sales Call

Using the Structured Product Messaging (SPM) page layouts, sales representatives can see the call objectives for their products, the outcomes expected from the sales call for their products, and they can determine their call objectives for a future visit, all of which are based solely on the product. Typically, sales representatives access these records during the product detailing session of a call with a physician to discuss one or more drugs. The details of the visit are captured in a contact call record, and the details of the drug are available in the product record.

In the Product Detailed related information section, the sales representative can pick and choose the following:

- Call objectives (messaging plan items) from a predefined set of call objectives for a particular product or drug
- Next call objectives (messaging plan item relations) from a predefined set of next call objectives for a particular product or drug
- Outcomes (message responses) from a predefined set of outcomes for a particular product or drug

For example, the following table shows the call objectives (messaging plan items) that the sales manager might set for a sales representative.

RowID	Product Name	Call Objective Name
12-1111	Drug A	Introduce the benefits of Drug A to the physician.

RowID	Product Name	Call Objective Name
12-1112	Drug A	Discuss the proposed pricing and discount regime of Drug A with the physician.
12-1113	Drug A	Discuss the potential sales of Drug A with the physician for the coming year.
12-1114	Drug A	Drop off supplementary information about Drug A to the physician.
12-1115	Drug B	Inform the physician about the superiority of Drug B relative to Drug A for certain medical conditions.
12-1116	Drug B	Drop off samples of Drug B to the physician.

Fields in the Products Detailed Related Information Section

The following fields are available only in the Products Detailed Related Information section:

- Primary Messaging Plan Item (which can be renamed Call Objective)
- Primary Messaging Plan Item Rel (which can be renamed Next Call Objective)
- Primary Message Response (which can be renamed Outcome)

In addition, the following related items are available to associate SPM (or PCD) records with the Products Detailed record:

- Call Product Detail Call Objectives (Call Product Detail Messaging Plan Items)
- Call Product Detail Next Call Objectives (Call Product Detail Messaging Plan Item Relations)
- Call Product Detail Outcomes (Call Product Detail Message Responses)

This topic refers to these related items collectively as *Call Product Detailed related items*. Call Product Detailed related items and PCD records have a many-to-many relationship. That is, one PCD record can be associated with multiple and different Call Product Detailed related item records.

The company administrator for Oracle CRM On Demand Life Sciences Edition configures the Products Detailed Related Information section for the call page layouts for account calls, contact calls, and attendee calls. For more information on configuring the page layouts for Oracle CRM On Demand Life Sciences Edition, see the information on page layouts in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Before you begin. Your administrator must set up dynamic page layouts for SPM as described in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*. If your administrator sets up the dynamic page layouts, then selecting an SPM type results in a different page layout from the default layout for PCD record types. For example, for a Messaging Plan Item record, selecting a Call Objective type results in a Call Objective page layout. For more information on setting up dynamic page layouts, see Specifying Dynamic Page Layouts (on page 1314). In addition, your administrator must set up your user access profile so that you have Read-Only, View, or Inherit Primary access to the related information SPM records on the Products Detailed detail page.

To associate the SPM (or PCD) record types with the Products Detailed record, you must meet the following conditions:

- The products on the Call Product Detailed related items and PCD records must match.
- You must set the PCD record types as follows:
  - The Messaging Plan Item type must be set to Call Objective.
  - The Messaging Plan Item Relations type must be set to Next Call Objective.
  - The Message Response type must be set to Outcome.

These conditions are enforced when you create the associations. However, they are not enforced thereafter. Consequently:

- Do not change the Product field on the Call Product Detailed related items after you have created an association.
- Do not modify the Product and Type fields on the PCD records after they have been added to Call Product Detailed related items as child records.
- Do not delete any existing association or modify the Product Detailed or PCD records and then attempt to restore the association.

To associate call objectives, next call objectives, and outcomes with products detailed in a sales call

1. In the Call Detail page for a contact call, account call, or attendee call, navigate to the Product Detailed related information section.

   The Product Detailed section includes columns for the Primary Call Objective (Primary Messaging Plan Item), Primary Next Call Objective (Primary Messaging Plan Item Relations), and Primary Outcome (Primary Message Response).
2. Navigate to the row for the product that you are discussing during the sales call, and click the product name, for example, Drug A.
3. In the Product Detailed Detail page:
   - To associate a call objective with Drug A, scroll to the Call Product Detail Call Objectives (Call Product Detail Messaging Plan Items) related information section, click Select, and in the Edit page, use the Lookup selector to select the call objective (messaging plan item) for Drug A from the list of call objectives (messaging plan items), and then save the Product Detailed record.
   - To associate a next call objective with Drug A, scroll to the Call Product Detail Next Call Objectives (Call Product Detail Messaging Plan Item Relations) related information section, click Select, and in the Edit page, use the Lookup selector to select the next call objective (messaging plan item relations) for Drug A from the list of next call objectives (messaging plan item relations), and then save the Product Detailed record.
   - To associate an outcome with Drug A, scroll to the Call Product Detail Outcomes (Call Product Detail Message Responses) related information section, click Select, and in the Edit page, use the Lookup selector to select the outcome (messaging response) for Drug A from the list of outcomes (messaging responses), and then save the Product Detailed record.

   NOTE: You might need to add the related information sections (in the preceding list) to the Product Detailed Detail page. For information about personalizing Detail page layouts, see Changing Your Detail Page Layout (on page 749). If the sections are not available to add to your page layout, then contact your company administrator.

   NOTE: SPM (or PCD) records cannot be created from within a Product Detailed detail view, but they can be associated only with the Product Detailed record. The SPM (or PCD) records must be created from the SPM (or PCD) pages and must be associated with the same product brand, for example, Drug A. Each SPM (or PCD) record can be associated with the product brand that is detailed in different calls. However, within the same call, you cannot choose the same SPM (or PCD) record for the same product being detailed. Your administrator must set up the SPM (or PCD) Detail pages as described in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*.

Selecting the Primary Call Objective, Primary Next Call Objective, or Primary Outcome for a Detailed Product

You can select the primary call objective (primary messaging plan item), primary next call objective (primary messaging plan item relations), or primary outcome (primary message response) for the product being detailed using the following procedure. The call objective, next call objective, and outcome that you select as primary are displayed in the Product Detailed related item section in the Call Detail page. The purpose of the primary designation is to determine which item record is displayed first in the Products Detailed page. No special processing occurs for this designation.

Before you begin. Your administrator must set up dynamic page layouts for SPM as described in *Configuration Guide for Oracle CRM On Demand Life Sciences Edition*. If your administrator sets up the dynamic page layouts, then selecting an SPM type results in a different page layout from the default layout for PCD record types. For example, for a Messaging Plan Item record, selecting a Call Objective type results in a Call Objective page layout. For more information on setting up dynamic page layouts, see Specifying Dynamic Page Layouts (on page 1314). In addition, your administrator must set up your user access profile so that you have Read-Only, View, or Inherit Primary access to the related information SPM records on the Products Detailed detail page.

To select the Primary Call Objective, Primary Next Call Objective, or Primary Outcome

1. Navigate to the Products Detailed Detail page for the product that you are detailing (for example, Drug A).
2. To designate a call objective (messaging plan item) as the primary call objective (primary messaging plan item):
   a. Edit the Products Detailed Detail page.
   b. For the Primary Call Objective (Primary Messaging Plan Item) field, use the Lookup selector to choose a call objective (messaging plan item) from the list as the primary objective.
3. To designate a next call objective (messaging plan item relations) as the primary next call objective (primary messaging plan item relations):
   a. Edit the Products Detailed Detail page.
   b. For the Primary Next Call Objective (Primary Messaging Plan Item Relations) field, use the Lookup selector to choose a next call objective (messaging plan item relations) from the list as the primary objective.
4. To designate an outcome (message response) as the primary outcome (message response):
   a. Edit the Products Detailed Detail page.
   b. For the Primary Outcome (Primary Message Response) field, use the Lookup selector to choose an outcome (message response) from the list as the primary outcome.

Example of Using Structured Product Messaging Records and Product Indications

This topic gives one example of how administrators or sales managers might set up the Structured Product Messaging (SPM) records and Product Indication records for sales representatives to detail or drop off products for customers. You might use this feature differently, depending on your business model.

1. A sales manager or administrator typically sets up the following information for the sales team:
   - A Call Objective Plan (Messaging Plan) for a specific product that might optionally include a specific indication (product indication)

     For information on messaging plans, see Messaging Plans (on page 612).
   - Product Indication records as required

     For information on production indications, see Product Indications (on page 633).
   - The Call Objectives (Messaging Plan Items), Next Call Objectives (Messaging Plan Item Relations), and Outcomes (Message Responses) for the Call Objective Plan, as required

     This step standardizes the call purpose and outcome, and it structures the goals of each call for the sales team.

     For information on messaging plan items, see Messaging Plan Items (on page 618). For information on messaging plan item relations, see Messaging Plan Item Relations (on page 624). For information on message responses, see Adjusting Message Responses (on page 216).
2. After the SPM records and product indications are set up, a pharmaceutical sales representative typically performs the following tasks:

a. Visits a physician or hospital and enters the call information in the Call Detail page for the account or contact

   For information on conducting sales calls, see Tracking Visits (Sales Calls) to Customers (on page 208).

b. Documents the samples or promotional items dropped for each contact, using the appropriate related information section in the Call Detail page (Samples Dropped or Promotional Items Dropped)

   For information on documenting the samples or promotional items dropped, see Linking Samples Dropped Information to Calls (on page 566) or Linking Promotional Item Information to Calls (on page 568).

c. Documents the products detailed for each contact or account, using the Product Detailed related information section in the Call Detail page. For each product detailed, the sales representative can do the following:

   - Select the indication (product indication).
   - Document additional call objectives, next call objectives, and outcomes.
   - (Optional) The sales representative can identify the indication and document the appropriate call objectives, next call objectives, and outcomes.

   For information on documenting products detailed, see Linking Product Detailed Information to Calls (on page 563).

d. After the sales representative has selected and documented all items related to the call, the sales representative submits the call.

Product Indications

Use the Product Indication pages to create, update, and track product indications. A *product indication* is a combination of a symptom or malady and the specific product or drug that alleviates the symptom or malady. Typically, a pharmaceutical sales representative details the product indication during a call with a health practitioner. Examples of product indications are Allergy – Drug A, Asthma – Drug A, Arrhythmia – Drug B, and Heart Failure – Drug C. In this example, Drug A is used to treat the symptoms of both allergies and asthma.

A product can have zero or more indications. The Product Indication record tracks the unique combination of the product with the associated indication. If a product indication exists, then the product indication name must be unique. When displaying products detailed in a customer call, a list of product indications are available for the sales representative to select during a product detailing session. The product indications are available on the Products Detailed related information section in a Call Detail page.

A product indication is a major component of the product messaging process for a pharmaceutical sales representative. Products or drugs are typically detailed at a product level by the sales representative and not at a stock-keeping unit (SKU) level in the product inventory system. For example, Drug A can have multiple indications: one for chronic obstructive pulmonary disease (COPD), one for asthma, and so on. Each indication has its own unique call objective plan (messaging plan) and call objectives (messaging plan items). You can use the product indication to filter the appropriate related information sections for structured product messaging records, such as Call Objectives Plans (Messaging Plans) and Call Objectives (Messaging Plan Items). For more information on detailing products, using the Products Detailed related information section in a Call Detail page, see Linking Product Detailed Information to Calls (on page 563). For more information on structured product messaging (SPM), see Structured Product Messaging (on page 627).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking product-indication information, then the Product Indication tab might be excluded from your setup.

Working with the Product Indication Homepage

The Product Indication Homepage is the starting point for managing product indications. This page displays information that is relevant to you.

NOTE: Your company administrator can customize the layout of your Product Indication Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Before you begin. To work with product indications, your user role must include the Manage Pharmaceutical Access privilege.

Creating a Product Indication

You can create a new product indication by clicking the New button in the Recently Modified Product Indications section. For more information, see Creating Records (on page 51) and Product Indication Fields (on page 636).

Working with Product Indication Lists

The Product Indication List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for product indications.

Product Indication List	Filters
All Product Indications	All product indications to which you have visibility, regardless of who owns the product indication.
Recently Modified Product Indications	All product indications with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, see Manage Lists Page (on page 140). The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Product Indications

The Recently Modified Product Indications section shows the product indications most recently modified.

Click Show Full List to expand the list.

Adding Sections to Your Product Indication Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Product Indication Homepage:

- Recently Created Product Indications
- Recently Modified Product Indications
- My Recently Created Product Indications
- My Recently Modified Product Indications
- Additional report sections (Your company administrator can make report sections available for display on your Product Indication Homepage.)

To add sections to your Product Indication Homepage

1. On the Product Indication Homepage, click Edit Layout.

2 On the Product Indication Homepage Layout page, use the arrows to add or remove sections, and to organize the sections on the page.
3 Click Save.

Related Topics

See the following topics for related information about product indications:

- Product Indications (on page 633)
- Managing Product Indications (on page 635)
- Product Indication Fields (on page 636)

Managing Product Indications

For information about managing product indications, see the following topics:

- Associating Product Indication Records with Products Detailed (on page 635)
- Associating Product Indications with Structured Product Messaging Records (on page 636)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about product indications:

- Product Indications (on page 633)
- Working with the Product Indication Homepage (on page 633)
- Product Indication Fields (on page 636)

Associating Product Indication Records with Products Detailed

You associate a product indication record typically with a product that you are detailing by using the Products Detailed related information section.

To associate product indication records with products detailed

1 Create the product indication records for the product that you are detailing.
2 Navigate to the Products Detailed related information section on the Call Detail page for the customer call, and edit the product detailed record for the product of interest.
3 For the Indication Name field, use the Lookup selector to choose a product indication name from the list of product indications that is available for the product that you are detailing.

Associating Product Indications with Structured Product Messaging Records

You associate a product indication record typically with structure product messaging (SPM) records, such as call objectives plans (messaging plans), call objectives (messaging plan items), next call objectives (messaging plan item relations), and outcomes (message responses).

To associate product indication records with structured product messaging records

1. Create the product indication records for the product that you are detailing.
2. Navigate to each SPM record type (for example, Call Objective Plan (Messaging Plan), Call Objective (Messaging Plan Item), Next Call Objective (Messaging Plan Item Relations), Outcome (Message Response), and edit the record of interest.
3. For the Indication Name field, use the Lookup selector to choose a product indication name from the list of product indication names that is available for the product that you are detailing.

   NOTE: Your company administrator must set up the Indication name field on the SPM record type.

Product Indication Fields

Use the Product Indication Edit page to add a product indication or update details for an existing product indication. The Product Indication Edit page shows the complete set of fields for a product indication.

TIP: You can also edit product indications on the Product Indication List page and the Product Indication Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the product indication fields.

Field	Description
Indication Name	The name of the product indication record. Some examples are Allergy, Asthma, Arrhythmia, Heart Failure, and so on. The maximum length is 50 characters. (Required)
Product Indication Name	Read Only. A concatenation of the Product Name and the Indication Name. For example, Asthma – Drug A or Allergy – Drug A, assuming that Drug A is used to treat both asthma and allergies. This field must be unique in your company.
Product	The product name at the brand level. The brand is defined on the Product record when the product's Type field is set to Detail, for example, Drug A. Choose the product name, using the Lookup icon. The Product Indication records are sorted by Product Name. This field is required by default. **NOTE:** The product must be a valid product for the Product Category field.
Description	Additional details to describe the indication. The maximum length is 255 characters.
Product: Product Category	Read Only. The product category of the selected product brand. The company administrator defines the product category, for example, Antihypertensive, Antianxiety, Asthma, Marketing Promotional Items, and so on.

Orders

The Order record type, although already available in Oracle CRM On Demand, has been enhanced to improve Life Sciences functionality. You use the Order pages to create, update, and track orders and the associated order items for products. For example, sales representatives can use the Order pages to do the following:

- Create a direct request for sample fulfillment as well as submit an order to the main office for samples to be sent directly to customers.
- Place an internal order with the main office to replenish samples that have been exhausted. Sales representatives periodically run out of samples, and so they can reorder them as required.

The Order record type is linked to all custom objects and can be enabled for integration by using Web integration events and workflows. If the Orders section is not visible on a custom object detail page, click the Edit Layout link in the upper-right corner of the page, and add the Orders section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

Before you begin: To work with orders, the Order Usage value on the company profile page must be set to CRM On Demand Order Management, and your user role must include the Enable Order Access privilege.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking orders and the associated order line item information, then the Orders tab might be excluded from your setup.

Working with the Order Homepage

The Order Homepage is the starting point for managing orders and associated order items for products.

NOTE: Your company administrator can customize the layout of your Order Homepage. In addition, if your user role includes the Personalize Homepages privilege, then you can add sections to the page and remove sections from the page.

Before you begin. To work with orders and order items for products, the Order Usage value on the company profile page must be set to CRM On Demand Order Management, and your user role must include the Enable Order Access privilege. For more information, see Setting Up Your Company Profile and Global Defaults (on page 1123).

Creating an Order

The samples administrator creates a new order by clicking the New button in the My Recently Created Orders section. For more information, see Creating Records (on page 51) and Order Fields (on page 641).

Working with Order Lists

The Orders List section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for orders.

Order List	Filters
All Orders	All orders to which you have visibility, regardless of who owns the order or when it was created.
My Recently Created Orders	Filters orders, with your name in the owner field, sorted by the created date.

Order List	Filters
All Recently Created Orders	Filters all created orders to which you have visibility, sorted by the created date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recent Orders

The My Recently Created Orders and My Recently Viewed Orders section shows the orders that were created or viewed most recently.

Click Show Full List to expand the list.

Adding Sections to Your Order Homepage

If your user role includes the Personalize Homepages privilege, then you can add some or all of the following sections to your Order Homepage:

- Recently Created Orders
- Recently Modified Orders
- My Recently Created Orders
- My Recently Modified Orders
- Additional report sections (Your company administrator can make report sections available for display on your Order Homepage.)

To add sections to your Order Homepage

1. On the Order Homepage, click Edit Layout.
2. On the Order Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about orders and order items for samples:

- Orders (on page 637)
- Order Fields (on page 641)
- Managing Orders

Managing Orders

For information about managing orders, see:

- About EBIZ PIP Integration and Oracle CRM On Demand Order Management (on page 639)
- Creating an Order Item for Products (on page 640)
- Submitting an Order for Products (on page 641)
- Linking Sample Request Information to Calls (on page 570)

NOTE: The orders feature is not part of the standard edition of Oracle CRM On Demand, so it might not be available to your company.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Working with Records (on page 46)
- Transferring Ownership of Records (on page 145)
- Deleting and Restoring Records (on page 173)
- Sharing Records (Teams) (on page 146)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information about orders:

- Orders (on page 637)
- Order Fields (on page 641)
- Working with the Order Homepage (on page 637)

About Ebiz PIP Integration and Oracle CRM On Demand Order Management

Oracle CRM On Demand supports two types of order management that are mutually exclusive. Administrators can select the type of order management to use by setting the Order Usage option in the Company Profile page:

- Oracle CRM On Demand Order Management, which is provided in Oracle CRM On Demand Life Sciences Edition

  You cannot use Oracle CRM On Demand order management and integrate orders with Oracle E-Business Suite. To integrate orders with Oracle E-Business Suite, you must use the Ebiz PIP Integration option.
- Ebiz PIP Integration, which is the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution

  With the Ebiz PIP Integration option, order records in Oracle CRM On Demand contain read-only header information, which allows information from Oracle E-Business Suite to be stored in Oracle CRM On Demand for display purposes only. All order and line items are created in Oracle E-Business Suite. When you select the Ebiz PIP Integration option, Oracle CRM On Demand does not track order line items.

Considerations When Migrating Ebiz PIP Integration Order Management to Oracle CRM On Demand Order Management

If you are currently using the Ebiz PIP Integration option for order management, and if you want to display the following items on Oracle CRM On Demand and provide custom object support for your customizations, then you must migrate your orders to Oracle CRM On Demand order management:

- Order Home page
- Order lists for each account or contact
- Order line item entries

In addition to migrating to Oracle CRM On Demand order management, Oracle CRM On Demand Customer Care must enable the Order and Order Item record types as well as workflows, import and export, and Web services. Oracle CRM On Demand provides integration with the Price List record type, which was previously available only in Oracle CRM On Demand for Partner Relationship Management. When migrating your orders to Oracle CRM On Demand order management, Oracle CRM On Demand Customer Care must enable the necessary privileges to make the Price List record type visible to you. After migrating your orders to Oracle CRM On Demand order management, you can customize the order records in Oracle CRM On Demand for your business logic requirements. For more information on using the Order Usage option in the company profile, see Setting Up Your Company Profile and Global Defaults (on page 1123).

Creating an Order Item for Products

You can use the Order pages to create and update order items for products so that you can track what products have been purchased by the customer as part of the order.

NOTE: You can also use the Sample Request pages to link sample request information to calls, see Linking Sample Request Information to Calls (on page 570). Note that if you customize the Order Detail page by adding a new field, then the new field will also be available on Sample Request pages.

Before you begin. To work with orders and order items for products, the Order Usage value on the company profile page must be set to CRM On Demand Order Management, and your user role must include the Enable Order Access privilege.

To create or update an order item for products

1. On the Order Homepage, select the order that you want.

   For information on selecting orders, see Finding Records (on page 74).
2. On the Order Detail page:
   - Click New in the Order Items section to add an order line item to the order.

     NOTE: You might want to add the Order Items section to your layout. For more information on changing the layout, see Changing Your Detail Page Layout (on page 749).
   - Click Edit next to an existing order line item to update that order item.
3. On the Order Item Detail or Edit page, complete the fields described in the following table, and then save the record.

Field	Description
Order Item Number	(Read-only) The unique number for this order line item.
Currency	The currency in which this order item will be processed. Use the Lookup selector to choose the currency.
Discount Amount	This field is not applicable to the current release of Oracle CRM On Demand.
Discount Percent	This field is not applicable to the current release of Oracle CRM On Demand.
Product	(Required) The product that is being ordered.
Quantity	(Required) The quantity of product that is being ordered. The value in this field cannot be negative.
Order	(Read-only) The parent order to which this order line item is linked.

Field	Description
Order: External Unique ID	(Read-only) The unique external ID of the parent order to which this order line item is linked.
Price	This field is not applicable to the current release of Oracle CRM On Demand.
Price after Discount	This field is not applicable to the current release of Oracle CRM On Demand.
Status	(Required) The value in this field is In Progress by default.

Related Topics

See the following topics for related information about orders:

- Orders (on page 637)
- Working with the Order Homepage (on page 637)
- Managing Orders
- Order Fields (on page 641)

Submitting an Order for Products

When you have finished creating and updating order items for an order object, you can submit the order.

Before you begin. To work with orders and order items for products, the Order Usage value on the company profile page must be set to CRM On Demand Order Management, and your user role must include the Enable Order Access privilege.

To submit an order for products

1. On the Order Homepage, select the order that you want.

   For information on selecting orders, see Finding Records (on page 74).
2. On the Order Detail page, review the order items that are associated with this order for products, and make sure that you are satisfied with the information recorded.
3. Click Submit to submit the order for products, including all its associated order line items.

   The value in the Order Creation Status field for the order changes to Submitted to indicate that the order for products has been submitted for processing. You cannot modify an order for products that has been submitted.

Related Topics

See the following topics for related information about orders:

- Orders (on page 637)
- Working with the Order Homepage (on page 637)
- Managing Orders
- Order Fields (on page 641)

Order Fields

Use the Order Edit page to add an order for products or update the details for an existing order for products. The Order Edit page shows all the fields for an order.

TIP: You can also edit orders on the Order Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the order fields.

Field	Description
Key Order Information	
Order Number	A unique number that is assigned to each order.
Type	The Order category. The default value for Type for an Order record is Order. You can choose the following values using the picklist: Sample Request and Order. **NOTE:** Your company administrator must set up this editable field to be available on the page layout because it is not available on the page layout by default.
Account	The account that is associated with this order.
Opportunity	The opportunity that is associated with this order.
Contact	The contact that is associated with this order.
Order Created	The date the order was created.
Order Creation Status	(Read-only) The value in this field is In Process by default. When you submit an order for products, the value in this field changes to Submitted.
External Unique Id	Unique external ID for order integration with Oracle CRM On Demand.
Id	The value in this field uniquely identifies the order.
Shipping Address	The address to which the order will be shipped. Use the Lookup selector to select an address. This field must be completed to create a sample request order, see Linking Sample Request Information to Calls (on page 570).
Billing Address	The billing address for the order in context.
Order Status	The status of the order, which can be one of the following: Pending, Shipped, Processed, or Submitted. You can set the status if required. When you submit the order, the order status changes to Submitted.
Additional Information	

Field	Description
Owner	The person who created this order record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Description	(Optional) A description of the order.

Related Topics

See the following topics for related information about orders:

- Orders (on page 637)
- Working with the Order Homepage (on page 637)
- Managing Orders

Quotes

A quote record contains an offer to a customer for specific products and services at a specific price. Using Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite, you can start creating a quote from Oracle CRM On Demand by clicking the New Quote button in the Quotes related item section of an opportunity record. The quotes records are created and maintained within Oracle E-Business Suite and synchronized with Oracle CRM On Demand. From Oracle CRM On Demand, users can view all of the quotes that are associated with an account or opportunity that have been created through the integration pack. The integration pack uses the Quote record type in Oracle CRM On Demand. Customers who have licensed the integration pack must contact Oracle CRM On Demand Customer Care to have them set up the Quote record type.

After the quote record type is set up, you can enter or update account, account-contact, and product information in Oracle E-Business Suite and synchronize that information to Oracle CRM On Demand. You can use this data within Oracle CRM On Demand to manage sales leads and opportunities. Typically, you start creating a quote from Oracle CRM On Demand when the sales cycle progresses to the point at which a quote is required. For more information on configuring the integration pack, see *Oracle Application Integration Architecture Oracle Lead to Order Integration Pack for Oracle CRM on Demand and Oracle E-Business Suite Implementation Guide*.

Related Topics

See the following topics for related information:

- Orders (on page 637)
- About Ebiz PIP Integration and Oracle CRM On Demand Order Management (on page 639)
- Opportunities (on page 309)
- Accounts (on page 265)

Blocked Products

This feature is specific to Oracle CRM On Demand Life Sciences Edition. Use the Blocked Product pages to specify that certain products are blocked for primary contacts. You create one blocked product record for each product that you want to block for a specified primary contact. You can view the products that are blocked for a contact in a read-only list in the Blocked Products related information section of the Contact Detail page.

What Restrictions Apply to Blocked Products?

The presence of blocked product records filters the products that you can select for products detailed, samples dropped, promotional items, and sample requests during a customer call. Blocked product records prevent specified blocked products from appearing on the list of products available in the following Call Detail related items:

- Available Products to Detail
- Available Samples to Drop
- Available Promotional Items to Drop
- Available Message Plans

Blocked product records also prevent the specified blocked products from appearing on the Product Lookup window on Products Detailed or Products Edit pages. If you do not want this filtering to occur, then do not populate blocked product records.

NOTE: In earlier releases of Oracle CRM On Demand, blocked product records did not filter the products available in the Call Detail related items or the Product Lookup window when completing a customer call. To prevent blocked product records that were created before Release 22 from filtering the available products in this release, you must delete those blocked product records.

Products Are Not Blocked at the Brand Level

To prevent all items for a product brand from being dropped or discussed in a sales call, you must block all the available items for the product brand, including promotional items, informational items, or product samples. For example, to block all product items associated with Drug X for the primary contact Dr. Smith, you must set up individual entries for each item that you want to block as rows of data in a Blocked Product record:

- Dr. Smith - Drug X 400 mg
- Dr. Smith - Drug X 200 mg
- Dr. Smith - Drug X promotional leaflet
- Dr. Smith - Drug X golf ball

Blocking products enables you to block some items for a product brand while not blocking other items. For example, you can block a primary contact from receiving samples of a drug, but you can allow the contact to receive promotional items about that drug, or you can allow the contact to receive 400 mg of a drug but not the 200-mg dosage.

Requirements for Blocking Products for a Primary Contact

To block products for a primary contact, your user role and access profiles must have the appropriate access to the Blocked Product record type. Also, the Blocked Product tab must be available for your role. To make the Blocked Product tab available to another user role, your user role must include the Manage Pharmaceutical Access privilege.

Working with the Blocked Product Homepage

The Blocked Product Homepage is the starting point for managing blocked products.

NOTE: Your company administrator can customize the layout of your Blocked Product Homepage. In addition, if your user role includes the Personalize Homepages privilege, then you can add sections to the page, and remove sections from the page.

Creating a Blocked Product Record

To create a blocked product record, click the New button in the Recently Modified Blocked Products section of the Blocked Product Homepage.

Working with Blocked Product Lists

The Blocked Product Lists section shows a number of filtered lists. Filtered lists are subsets or groups of records that allow you to limit the number of records to work with at a time. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for blocked products.

Blocked Product List	Filters
All Blocked Products	All blocked products to which you have visibility.
Recently Modified Blocked Products	All blocked products to which you have visibility, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Blocked Products

The Recently Modified Blocked Products section shows the blocked products that were modified most recently.

Click Show Full List to expand the list.

Adding Sections to Your Blocked Product Homepage

If your user role includes the Personalize Homepages privilege, then you might be able to add additional report sections to your Blocked Product Homepage. Your company administrator can make report sections available for display on your Blocked Product Homepage.

To add sections to your Blocked Product Homepage

1. On the Blocked Product Homepage, click Edit Layout.
2. On the Blocked Product Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page. Click Save.

Related Topics

See the following topics for related information about blocked products:

- Blocked Products (on page 643)
- Managing Blocked Products (on page 645)
- About Displaying Lists of Blocked Products for Contacts (on page 646)
- Blocked Product Fields (on page 647)
- Dropping Samples During a Sales Call (on page 558)

Managing Blocked Products

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)

- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

- Blocked Products (on page 643)
- Working with the Blocked Product Homepage (on page 644)
- About Displaying Lists of Blocked Products for Contacts (on page 646)
- About Blocking Products and Smart Call Templates (on page 646)
- About Sample Request Item Workflows and Blocked Product Rules (on page 647)
- Blocked Product Fields (on page 647)
- Dropping Samples During a Sales Call (on page 558)

About Displaying Lists of Blocked Products for Contacts

To allow users to see the Blocked Products section on the Contact Detail page, you must add the Blocked Products related information section to the Contact Detail page layouts for the appropriate roles. You must also configure the appropriate user roles and access profiles to give users read-only access to the Blocked Products related record type for the Contact record type. For information about adding related information sections to page layouts, see Customizing Static Page Layouts (on page 1267) and Specifying Dynamic Page Layouts (on page 1314). For information about setting access levels for user roles and access profiles, see User Management and Access Controls (on page 1361).

Related Topics

- Blocked Products (on page 643)
- Working with the Blocked Product Homepage (on page 644)
- Managing Blocked Products (on page 645)
- Blocked Product Fields (on page 647)
- Dropping Samples During a Sales Call (on page 558)

About Blocking Products and Smart Call Templates

The Oracle CRM On Demand rules for blocking products do not apply to smart call templates. If you create a smart call for group or repeated usage, and if you later apply product-blocking rules to a product specified in the smart call template, then Oracle CRM On Demand does not block the product during a sample drop, product detail, or product promotion if the smart call template is used.

For example, consider the following situation:

1. You create two contacts, for example, Contact 1 and Contact 2.
2. You create a call for Contact 1, and drop a sample for Contact 1 with the product set to Sample A.
3. You save the call, using the Public Smart Call template.
4. You create a blocked product for Contact 2, with the product set to Sample A.
5. You create a call for Contact 2, and select the smart call template that you created.

In this situation, using the template automatically creates Sample A and associates it with Contact 2 and bypasses the product-blocking rule. Even though Sample A is defined as blocked for Contact 2, Sample A is available on the product lookup for Contact 2.

CAUTION: Based on the outcome of the previous example, you must use smart call templates carefully when blocking products. If product-blocking rules are added after you have set up smart call templates, then you must change your reporting mechanism manually for product disbursement. If you block products in your company, then it is recommended that you create your smart call template after the product-blocking rule has been defined, and add the product to the smart call if it is not blocked for that specific customer.

About Sample Request Item Workflows and Blocked Product Rules

Processing blocked products is not supported for sample request items when workflows are used in Oracle CRM On Demand. For example, in the following situation, a workflow created for a sample request item sets the Product field for the sample request item with a blocked product, Prod1:

1. You create the following records:
   - Account: Acc1
   - Contact: Con1 with Address
   - Products: Prod1 and Prod2
2. You allocate Prod1 and Prod2 to an administrative user.
3. You create a blocked product record for Prod1 and Con1 so that Prod1 is defined as a blocked product for the contact Con1.
4. You create a workflow for a sample request item with a When New Record Saved trigger and an Update Values action with Field Name set to Product and its value set to Prod1.
5. From Acc1, you create a call and then you create a sample request in the Sample Request section in the call with Con1 as the contact in a call.
6. In the Sample Request section, you click New on Sample Request Item, and populate the fields as follows:
   - Order Item Number: 1
   - Quantity: 1
   - Product: Prod2

   NOTE: Only Prod2 is visible because Prod1 is blocked for the contact Con1.
7. Save the record.

   Because Prod1 is blocked, you might expect that the sample request item workflow would not set the Product field to Prod1. However, although the workflow action that you set up in step 4 is triggered, the workflow does not follow the product-blocking rule. Consequently, the workflow sets the Product field for the sample request item with the blocked product, Prod1.

Blocked Product Fields

The Blocked Product Edit page shows the complete set of fields for a blocked product.

TIP: You can also edit blocked products on the Blocked Product List page and the Blocked Product Detail page. For more information about updating records, see Updating Record Details.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides information regarding some of the blocked product fields.

Field	Description
Product	The product that you want to block.
Contact	The contact for whom you want to block the product.

Related Topics

- Blocked Products (on page 643)
- Working with the Blocked Product Homepage (on page 644)
- Managing Blocked Products (on page 645)
- About Displaying Lists of Blocked Products for Contacts (on page 646)
- Dropping Samples During a Sales Call (on page 558)

10 Wealth Management

Oracle CRM On Demand provides the following record types for wealth management:

- **Financial Accounts.** Use these pages to manage financial account information.
- **Financial Account Holders.** Use these pages to manage information about holders of financial accounts.
- **Financial Account Holdings.** Use these pages to manage the transactions of a single financial product for a financial account.
- **Financial Plans.** Use these pages to manage the financial plans of a contact or business for one or more specific financial accounts.
- **Financial Products.** Use these pages to manage financial product information.
- **Financial Transactions.** Use these pages to track the transactions for a specific financial account.
- **Portfolios.** Use these pages to manage portfolio accounts.
- **Households.** Use these pages to manage information for a group of related contacts, who live in the same household.

Note: All of these record types are available only with Oracle CRM On Demand Financial Services Edition.

Households

Use the Household pages to create, update, and track household records. You can also use the Household pages to add appointments, tasks, opportunities and service requests directly associated with the household.

A *household* is a group of contacts generally sharing a common link or association such as a family (parents and children) who live at the same address within the same house. A household allows contacts to be grouped together and can track the contact groupings, allowing a contact to be grouped in to one or more households or contact groups. Financial institutions and individual users, such as bankers, advisors and relationship managers, have many different uses for grouping contacts. The related information for households can be accumulated from the contacts who are linked to the household.

A household provides valuable segmentation information on the household as a whole, as well as a summary of information about the household member contacts. You can use the Households pages to identify and capture demographic information about a household. You can also use the Household pages to review customer's financial accounts, products, and contact information that is associated with that household. This information allows you to assess customers' data.

Grouping all of a client's accounts by household allows a financial institution to identify a client's value to the organization and seek opportunities to cross-sell and upsell additional products and services to the client, such as homeowner's insurance and loans for children's education. In addition, the ability to view all of a customer's financial accounts by household allows a financial institution to view the household's overall financial position.

Subaccounts and Related Information for Households

You can use the Household pages to identify and profile a household. You can also use the Household pages to review a household's subaccounts and other related information including:

- **Contacts.** Contacts can be related to a household. On the Household page, you can view all contacts related to a household. For information on contacts, see Contacts (on page 287).
- **Activities.** Appointments or tasks can be related to a household either directly, or through the household contacts. On the Household page, you can view all the activities related to a household, and you can create new activities directly for the household. When you create a new appointment or task from the Household page, the values for Household Name and Primary Contact of the household are used by default. For more information on activities, see Activity Fields (on page 229).
- **Opportunities.** Opportunities can be related to a household either directly, or through the household contacts. On the Household page, you can view all the opportunities related to a household, and you can create new opportunities directly for the household. When you create a new opportunity from the Household page, the values for Household Name and Primary Contact of the household are used by default. For more information on opportunities, see Opportunities (on page 309).
- **Service Requests.** Service requests can be related to a household either directly, or through the household contacts. On the Household page, you can view all the service requests related to a household, and you can create new service requests directly for the household. When you create a new service request from the Household page, the values for Household Name and Primary Contact of the household are used by default. For information of service requests, Service Requests (on page 396).
- **Claims.** Claims can be related to a household. On the Household page, you can view all claims related to a household. For information on claims, see Claims (on page 688).
- **Financial Plans.** Financial plans can be related to a household. On the Household page, you can view all financial plans related to a household. For information on financial plans, see Financial Plans (on page 672).
- **Policy Holders.** Policy holders can be related to a household. On the Household page, you can view all policy holders related to a household. For information on policy holders, see Policy Holders (on page 709).
- **Financial Account Holders.** Financial account holders can be related to a household. On the Household page, you can view all financial account holders who are related to a household. For information on financial account holders, see Financial Account Holders (on page 666).
- **Household Team.** Users can be part of the team related to a household. On the Household page, you can view all team members (users) related to a household.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking household information, the Households tab might be excluded from your setup.

Working with the Household Homepage

The Household Homepage is the starting point for managing households.

NOTE: Your company administrator can customize the layout of your Household Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Household

You can create a household by clicking the New button in the My Recently Viewed Households section. For more information, see Creating Records (on page 51) and Household Fields (on page 653).

Working with Household Lists

The Household Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for Households.

Household List	Filters
Recently Modified Households	All households with your name in the Owner field, sorted by the modified date

Household List	Filters
All Households	All households to which you have visibility regardless of who owns the household

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Households

The My Recently Viewed Households section shows the households that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Household Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Household Homepage:

- Recently Created Households
- Recently Modified Households
- My Recently Created Households
- My Recently Modified Households
- One or more report sections (Your company administrator can make report sections available for display on your Household Homepage.)

To add sections to your Household Homepage

1. On the Household Homepage, click Edit Layout.
2. On the Household Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Related Information

See the following topics for related Household information:

- Households (on page 649)
- Managing Households (on page 651)
- Household Fields (on page 653)

Managing Households

To manage households, do the following tasks:

- Profiling Households (on page 652)
- Tracking Household Members (on page 652)

NOTE: This feature is not part of the standard application, so it might not be available in your version of Oracle CRM On Demand.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Transferring Ownership of Records (on page 145)
- Adding Notes (on page 157)
- Attaching Files and URLs to Records (on page 163)
- Deleting and Restoring Records (on page 173)
- Merging Records (on page 151)
- Sharing Records (Teams) (on page 146)
- Viewing Audit Trails for Records (on page 175)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related Household information:

- Households (on page 649)
- Working with the Household Homepage (on page 650)
- Household Fields (on page 653)

Profiling Households

You can profile households by updating the information in household records.

To profile a household

1. Select the household.

   For instructions on selecting households, see Finding Records (on page 74).
2. On the Household Detail page, click Edit.
3. On the Household Edit page, fill in the information. For a description of the fields, see Household Fields (on page 653).

Tracking Household Members

To track members for households, add them as contacts within the household.

To track household members

1. Select the household record.

   For instructions on selecting household records, see Finding Records (on page 74).
2. On the Household Details page, scroll down to the Contacts section and click Add.

   NOTE: You might want to add the Contacts section to your layout. For information on changing the layout, see Changing Your Detail Page Layout (on page 749).

3. On the Contact List page, click the Lookup icon in the New Contact field. This launches the Search for Contact window.

4 In the Search for Contact window, select a contact.

5 On the Contact List page, select the relation to the household for the contact in the Relationship drop-down.

Field	Description
New Contact	The contact name for the household. Select the contact in the Search for Contact window.
Relationship	The contact's relationship to the household. You can select many predefined relationships, for example: Head, Spouse, Child, In-Law, 2nd Generation Child, Boss, and so on.
Rollup	Check the Rollup check box to select a subset of contacts to rollup into the household financial totals (for example, Total Net Worth or Total Income). Contacts not selected are not rolled up into any of the totals for households, or for any related list such as Opportunities, Portfolios, Activities, or Notes. Rollup is checked by default. **Note:** The Rollup check box on the Contact Detail page and the Household Detail page are the same, so a change on one page is reflected in the other page.

6 Click Save on the Contact List page.

7 Drill down in the New Contact field to select a contact, and then select the relation to the household for the contact in the Relationship picklist.

For information on Household fields, see Household Fields (on page 653).

NOTE: Your administrator can customize the Household Contact record type by adding custom fields and also custom related information fields that have Contact or Household as the related record type. Your administrator can include the new custom fields and custom related information fields in the Household Contact page layout. You can edit custom fields in Household Contact related information sections, but you cannot edit custom related information fields. For information about custom related information fields and how to create them, see About Custom Related Information Fields (on page 1226) and Creating Custom Related Information Fields (on page 1227).

Household Fields

Use the Household Edit page to add a household or update details for an existing household. The Household Edit page shows the complete set of fields for a household.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields. Many fields on the Household pages are read-only because they are calculated from the contact records linked to the household with the Roll Up field checked. Additive fields, such as Total Assets, are totaled from all contacts with the Roll Up field checked in the household. Non-additive fields, such as addresses, are usually rolled up from the primary contact in the household.

If there are no contact records linked to the household, you can add contacts to the household record, see Tracking Household Members (on page 652).

Field	Description
Key Household Information	
Household Name	Limit of 50 characters.
Primary	Read-only.
Household Detail Information	
Type	Default values are: Family - Children, Family - No Children, Family - Senior Citizen, Single, Single Parent Family, Family, Extended Family, Unmarried Couple, Empty Nest, Retired, and Other.
Segment	Default values are: White Collar, Blue Collar, Rural, Own Residence, Renter, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-Millionaires, and Ultra High Net Worth.
Last Activity	Read-only. Reflects the date of the last activity linked to the household.
Head of Household DOB	Read-only.
Additional Information	
Account	Read-only.
Contact	Read-only.
Owner	The owner of the household record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run in the Analytics pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Household Financial Profile	
Total Income	The total income for all contacts that roll up into the household. Read-only.
Total Assets	The total assets for all contacts that roll up into the household. Read-only.
Total Expenses	The total expenses for all contacts that roll up into the household. Read-only.

Field	Description
Total Liabilities	The total liabilities for all contacts that roll up into the household. Read-only.
Total Net Worth	The total net worth for all contacts that roll up into the household. Read-only.
Investment Risk Profile	
Risk Profile	Populated from the primary contact record of the household. Read-only.
Experience Level	Populated from the primary contact record of the household. Read-only.
Investment Horizon	Populated from the primary contact record of the household. Read-only.
Current Investment Mix	Populated from the primary contact record of the household. Read-only.
Objective	Populated from the primary contact record of the household. Read-only.
Primary Goal	Populated from the primary contact record of the household. Read-only.

Related Information

See the following topics for related Household information:

- Households (on page 649)
- Working with the Household Homepage (on page 650)
- Managing Households (on page 651)
- Sharing Records (Teams) (on page 146)

Portfolios

Use the Portfolios pages to create, update, and track any type of portfolio. Portfolios can be any type of information related to a contact that you want to track.

Portfolios can represent the following:

- **Financial accounts.** A brokerage account, loan, or a credit card
- **Insurance contracts.** A life insurance policy or an annuity

You can use the Portfolio pages to identify and profile a portfolio.

TIP: You can use the financial account record type and financial account hierarchy to track financial account groups, which are also known as portfolios. For more information about financial accounts, see Tracking Parent Financial Accounts (on page 664).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account information, the Portfolios tab might be excluded from your setup.

Working with the Portfolio Account Homepage

The Portfolio Account Homepage is the starting point for managing portfolio accounts.

NOTE: Your company administrator can customize the layout of your Portfolio Account Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Portfolio Account

You can create a portfolio account by clicking the New button in the My Recently Viewed Portfolios section. For more information, see Creating Records (on page 51) and Portfolio Account Fields (on page 659).

Working with Portfolio Account Lists

The Portfolio Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for portfolio accounts.

Portfolio List	Filters
All Portfolio Accounts	All portfolio accounts to which you have visibility
Recently Created Portfolios	All portfolio accounts to which you have visibility, sorted by the created date
Recently Modified Portfolios	All portfolio accounts to which you have visibility, sorted by the modified date
My Recently Modified Portfolios	All portfolio accounts that you recently modified.
My Recently Created Portfolios	All portfolio accounts that you recently created.
My Portfolio Accounts	All portfolio accounts with your name in the Owner field

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Note: The availability of the Vehicles and Asset record types in the Portfolio Account listing is controlled by the Exclude Vehicle/Asset Records from Portfolio Accounts option on the company profile. For more information, see Setting Up Your Company Profile and Global Defaults (on page 1123).

Viewing Recently Modified Portfolio Accounts

The My Recently Viewed Portfolios section shows the portfolio accounts that you viewed most recently.

Adding Sections to Your Portfolio Account Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Portfolio Account Homepage:

- Recently Created Portfolios
- Recently Modified Portfolios
- My Recently Created Portfolios
- My Recently Modified Portfolios

- One or more report sections (Your company administrator can make report sections available for display on your Portfolio Account Homepage.)

To add sections to your Portfolio Account Homepage

1. On the Portfolio Account Homepage, click Edit Layout.
2. On the Portfolio Account Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Related Information

See the following topics for related portfolio account information:

- Portfolio Account Fields (on page 659)
- Managing Portfolio Accounts (on page 657)

Managing Portfolio Accounts

To manage portfolio accounts, do the following tasks:

- Tracking Key Contacts for Portfolio Accounts (on page 658)
- Specifying Portfolio Subaccounts (on page 658)

NOTE: This feature is not part of the standard application, so it might not be available in your version of Oracle CRM On Demand.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Linking Records to Your Selected Record (on page 117) (including referrals)
- Sharing Records (Teams) (on page 146)
- Transferring Ownership of Records (on page 145)
- Adding Notes (on page 157)
- Attaching Files and URLs to Records (on page 163)
- Deleting and Restoring Records (on page 173)
- Renaming Record Types (on page 1343)
- Merging Records (on page 151)
- Managing Calendars and Activities (on page 196)
- Process of Setting Up Books (on page 1441)
- Creating Web Applets for Record Types (on page 1279)
- Viewing Audit Trails for Records (on page 175)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related Portfolio Account information:

- Working with the Portfolio Account Homepage (on page 655)
- Portfolio Account Fields (on page 659)

Tracking Key Contacts for Portfolio Accounts

To track key contacts for portfolio accounts, add them as contacts linked to the portfolio account record.

To track key contacts for portfolio accounts

1. Select the portfolio account record.

   For instructions on selecting portfolio accounts, see Finding Records (on page 74).
2. On the Portfolio Account Details page, scroll down to the Contacts section and click Add.

   NOTE: You might want to add the Contacts section to your layout. For more information, see Changing Your Detail Page Layout (on page 749).
3. On the Contact List page, click the Lookup icon next to the Name column.
4. In the Lookup window, you can click New to create a new contact record or select an existing contact.
5. On the Contact List page, fill in the information as required.
6. Save the record.

Specifying Portfolio Subaccounts

You can indicate portfolio account hierarchies, such as a mutual fund that is within a life insurance policy or a brokerage account, by specifying a parent-child relationship. First create the parent portfolio account, and then select that account as the parent for the child or portfolio subaccount.

Portfolios have one-to-many relationship with portfolio subaccounts. For example, you can have many mutual fund or stock subaccounts for the brokerage portfolio account.

To create a portfolio subaccount

1. Select the parent portfolio account.

   For information on selecting portfolio accounts, see Finding Records (on page 74).
2. On the Portfolio Account Details page, scroll to the Portfolio Sub-Accounts section and click New.

   NOTE: You might have to add the Portfolio Sub-Accounts section to your layout. For information on changing the layout, see Changing Your Detail Page Layout (on page 749).
3. Complete the fields in the Portfolio Account Edit page that is launched.
4. Save the record.

To specify the parent portfolio account

1. Select the child portfolio subaccount.

   For instructions on selecting portfolio accounts, see Finding Records (on page 74).
2. On the Portfolio Account Edit page, click the Lookup icon next to the Parent Portfolio Account field.
3. In the Lookup window, select the parent portfolio account.
4. Save the record.

Portfolio Account Fields

Use the Portfolio Account Edit page to add a portfolio account or update details for an existing portfolio account. The Portfolio Account Edit page shows the complete set of fields for a portfolio account.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Account Information	
Account Number	Required field. Limit of 100 characters.
Institution	Lookup field for the institution linked with this portfolio account.
Product	Lookup field for the product linked with this portfolio account.
Account Type	A picklist of available account types. Default values are: Annuity Contract, Group Policy, 401K, Checking, IRA, Life Insurance, Mutual Fund, Savings, and Other.
Primary Contact	Read-only.
Account	Lookup field for the account linked with this portfolio account.
Revenue	Revenue linked with this portfolio account.
Purchase Date	The date that the financial account is opened.
Cancelled/Sold Date	The date that the account is closed. If this is an individual holding, it may be the date that all shares are sold.
Status	Status of the portfolio account. Default values are: Active, Pending, Quote, Terminated, and Closed.
Parent Portfolio Account	The parent portfolio account for the current portfolio account.
Owner	The owner of the portfolio account record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run in the Analytics pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be

Field	Description
	blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Primary Group	Primary group of the portfolio owner. For releases previous to release 13, this field is used to define Group visibility to Portfolio records. It is recommended that you use the book functionality to replace this capability. For more information, see Process of Setting Up Books (on page 1441).
Policy Information	
Risk Class	Defines the risk level of the portfolio. Limit of 50 characters.
Premium	The cost of the insurance policy in your currency units.
Face Value	The face value of the insurance policy in your currency units.
Effective Date	The start date for the insurance policy.
Expiration Date	The expiry date for the insurance policy.
Investment Information	
Total Asset Value	The value of all your investments in your currency units.
Valuation Date	The date of the valuation of your total assets.
Loan Information	
Loan Amount	The value of your loan in your currency units.
Annual % Rate	The interest rate for your loan.
Maturity	The date on which the loan is due for payment.
Term	Read-only. The concatenation of Term Length and Term Unit.
Term Length	The period of time over which the loan is amortized, usually expressed in months.

Field	Description
Term Unit	The picklist of possible term units. The default values are: Day, Week, Month, and Year.
Credit Card Information	
Credit Limit	The maximum credit available for the account.
Annual % Rate	The annual interest rate charged on charges placed on the balance.

Portfolio Contact Fields

The following table provides information about some fields that your company administrator may make available and which you might see under the Contacts related record for a portfolio account.

Field	Description
Primary Insured	This check box indicates that the person is generally the intended policy owner and the person who fills out and signs a request for insurance coverage.
Owner	This check box indicates the owner of the property being insured.
Named Insured	This check box indicates the named individual with whom an insurance contract is made, and whose interests are protected under the policy.

NOTE: Your administrator can customize the Contact Portfolio record type by adding custom fields and also custom related information fields that have Contact or Portfolio as the related record type. Your administrator can include the new custom fields and custom related information fields in the Contact Portfolio page layout. You can edit custom fields in Contact Portfolio related information sections, but you cannot edit custom related information fields. For information about custom related information fields and how to create them, see About Custom Related Information Fields (on page 1226) and Creating Custom Related Information Fields (on page 1227).

Related Information

See the following topics for related Portfolio Account information:

- Working with the Portfolio Account Homepage (on page 655)
- Managing Portfolio Accounts (on page 657)

Financial Accounts

Use the Financial Account pages to create, update, and track any type of financial account. Financial accounts are typically the financial accounts of a contact or business that the financial institution manages. However, financial accounts can also track all financial accounts of a contact or business, including those accounts at other financial institutions.

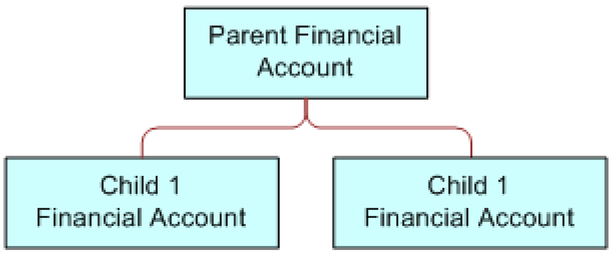
NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account information, the Financial Accounts tab might be excluded from your setup.

A *financial account* is a record of the financial transactions between financial institutions. It contains financial products for which the financial institution has a specific fiduciary responsibility. Financial accounts provide a structure for financial institutions to manage both contact and business relationships.

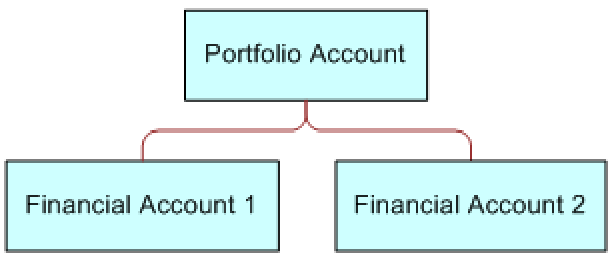
NOTE: Within Oracle CRM On Demand Financial Services Edition, *Account* is renamed *Business Account.* Business accounts represent a legal entity such as a business, company, or trust. They provide parent and child relationships to support divisions, departments, and other complex legal structures.

You use financial accounts to track any financial accounts types, such as savings, checking, mortgage, certificates of deposit, credit cards, demand deposit accounts, investments, loans, retirement, education, and so on.

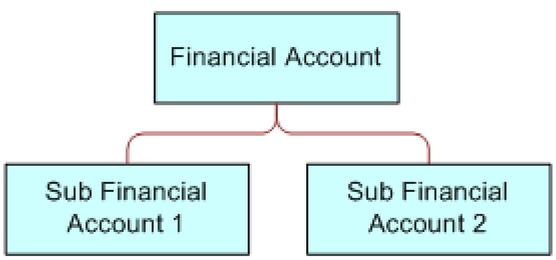
Using financial accounts, financial institutions can move from financial account-centric to client and household-centric relationships. Using this feature, you can access high-level financial account information that is contained in the Financial Account Type, Balance, and Joint fields to support client and household-centric relationships, including activities, opportunities, service requests, and calendars. Financial accounts also support accounts hierarchies and subaccounts. These hierarchies allow the grouping of accounts into portfolios. You use the grouping of accounts to group financial accounts into portfolios. The following figures show some examples of hierarchies. Figure 1 shows a parent and child relationship for a financial account. Figure 2 shows a portfolio account and financial account relationship. Figure 3 shows a financial account and subaccount relationship.



Parent and Child Relationship for Financial Account



Portfolio Account and Financial Account Relationship



Financial Account and Subaccount Relationship

You can use the Financial Account pages to identify and profile a financial account. You can also use the Financial Account pages to review a financial account's subaccounts and other related information including:

- Financial Account Holders (on page 666)
- Financial Account Holdings (on page 669)
- Financial Transactions (on page 681)
- Financial Plans (on page 672)
- Policies (on page 705)
- Opportunities (on page 309). On the Financial Account pages, you can view all opportunities related to a financial account.

- Activities**.** On the Financial Account pages, you can view all activities related to a financial account.
- Service Requests (on page 396)**.** On the Financial Account pages, you can view all service requests related to a financial account.
- Leads (on page 242)**.** On the Financial Account pages, you can view all leads related to a financial account.

Working with the Financial Account Homepage

The Financial Account Homepage is the starting point for managing financial accounts.

NOTE: Your company administrator can customize the layout of your Financial Account Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Financial Account

You can create a financial account by clicking the New button in the Recently Modified Financial Accounts section. For more information, see Creating Records (on page 51) and Financial Account Fields (on page 664).

Working with Financial Account Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial accounts.

Financial Account List	Filters
All Financial Accounts	All financial accounts to which you have visibility
Recently Modified Financial Accounts	All financial accounts that you recently modified.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Accounts

The Recently Modified Financial Accounts section shows the financial accounts that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Account Homepage

If your user role includes the Personalize Homepages privilege, you might be able to add additional sections to your Financial Account Homepage, depending on what your company administrator has made available for display on your Financial Account Homepage.

The following procedure describes how to add sections to your Financial Account Homepage.

To add sections to your Financial Account Homepage

1 On the Financial Account Homepage, click Edit Layout.

2 On the Financial Account Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3 Click Save.

Managing Financial Accounts

To manage financial accounts, do the following tasks:

- Tracking Parent Financial Accounts (on page 664)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related financial account information:

- Working with the Financial Account Homepage (on page 663)
- Financial Account Fields (on page 664)

Tracking Parent Financial Accounts

To allow tracking of a financial account's parent financial account, add the parent financial account to the Parent Financial Account Field on the child financial account.

To track a parent financial account

1 Select the financial account.

For information on selecting financial accounts, see Finding Records (on page 74).

2 On the Financial Account Detail page, click Edit.
3 On the Financial Account Edit page, select the Parent Financial Account field, and select a financial account.

Financial Account Fields

Use the Financial Account Edit page to add a financial account, or update details for an existing financial account. The Financial Account Edit page shows the complete set of fields for a financial account.

TIP: You can indicate financial account hierarchies, such as a retirement financial account, which is a subsidiary of a portfolio financial account, by selecting Financial Account. For more information about indicating hierarchies, see Tracking Parent Financial Accounts (on page 664).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Financial Account Profile	
Financial Account Number	The number of the financial account. This field has a limit of 50 characters.
Financial Account Type	The financial account type such as Savings, Credit, Mortgage, Investment, Wealth, Education, Insurance.
Primary Account	The check box is used to indicate that this financial account is the primary financial account.
Home Branch	The home branch for the financial account within the financial institution.
Financial Account	The name of the financial account. This field has a limit of 50 characters.
Open Date	The date on which the financial account was opened at the financial institution.
Joint	The check box used to specify that the financial account has joint ownership. More than one contact shares the ownership of the financial account.
Held Away	The check box is used to indicate that this financial account is being held away. *Held away* means that this financial account is not held by this financial institution, but is held at another financial institution.
Balance	The currency field representing the financial account's balance.
Balance as of	The date and time when the balance was last updated.
Financial Account Details	
Integration ID	The integration ID of the external information about the financial account. This field has a limit of 50 characters.
Held Away Institution	The name of the financial institution at which this financial account is being held away at.
Parent Financial Account	The parent financial account for this child financial account.
Financial Account Integration	
Description	The detailed description of the financial account.
External ID	The external source ID of the external information about the financial account. This field has a limit 50 characters.

Field	Description
External Last Updated	The date and time when the data for this financial account was last updated (from the external source).
External Source	The source of the external information about the financial account holding, for example, an application name, database name, integration name, and so on.
Additional Information	
Owner	The owner of the financial account record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Related Topics

See the following topics for related Financial Account information:

- Working with the Financial Account Homepage (on page 663)
- Managing Financial Accounts (on page 664)

Financial Account Holders

Use the Financial Account Holder pages to create, update, and track the relationship between a financial account and its holders. A *financial account holder* is any contact who has a relationship with the financial account (typically, the legal owner of the financial account.)

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account holder information, the Financial Account Holder tab might be excluded from your setup.

A financial account holder record tracks the relationships between contacts and financial accounts, enabling a complete understanding of which contacts are related to which financial accounts, and which financial accounts are related to which contacts.

Using financial account holders, financial institutions and users can track the relationship between contacts and financial accounts, and can track specific attributes and details of the relationship. Financial account holders track the role of a contact in relation to a financial account, such as the legal owner, guardian, advisor, benefactor, and so on.

Working with the Financial Account Holder Homepage

The Financial Account Holder Homepage is the starting point for managing financial account holders.

NOTE: Your company administrator can customize the layout of your Financial Account Holder Homepage. In addition, if your user role includes the Personalize Homepages privilege you can add sections to the page, and remove sections from the page.

Creating a Financial Account Holder

You can create a financial account holder by clicking the New button in the Recently Modified Financial Account Holders section. For more information, see Creating Records (on page 51) and Financial Account Holder Fields (on page 668).

Working with Financial Account Holder Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial account holders.

Financial Account Holder List	Filters
All Financial Account Holders	All financial account holders to which you have visibility, regardless of who owns the financial account holder
Recently Modified Financial Account Holders	All financial account holders, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Account Holders

The Recently Modified Financial Account Holders section shows the financial account holders that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Account Holders Homepage

If your user role includes the Personalize Homepages privilege, you might be able to add additional sections to your Financial Account Holder Homepage, depending on what your company administrator has made available for display on your Financial Account Holder Homepage.

The following procedure describes how to add sections to your Financial Account Holder Homepage.

To add sections to your Financial Account Holder Homepage

1. On the Financial Account Holder Homepage, click Edit Layout.
2. On the Financial Account Holder Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Related Information

See the following topics for related financial account holder information:

- Managing Financial Account Holders (on page 667)
- Financial Account Holder Fields (on page 668)

Managing Financial Account Holders

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)

- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Working with the Financial Account Holder Homepage (on page 666)
- Financial Account Holder Fields (on page 668)

Financial Account Holder Fields

Use the Financial Account Holder Edit page to add a financial account holder, or to update details of an existing financial account holder. The Financial Account Holder Edit page shows the complete set of fields for a financial account holder.

TIP: You can also edit financial account holder information on the Financial Account Holder List page and the Financial Account Holder Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Financial Account Holder Profile	
Financial Account Holder Name	The name of the financial account holder (usually a contact). This field has a limit of 100 characters.
Financial Account	The financial account with which the financial account holder is associated.
Role	The role of the financial account holder. A financial account holder can have more than one role. Some example roles are: Legal Guardian, Owner, Lawyer, and Influencer.
Primary Contact	Indicates whether the financial account holder is the primary contact for the financial account.
Joined	The date on which the financial account holder was first associated with the financial account. This might be different from the Open Date on the financial account. For example, a legal guardian might be assigned to (or given responsibility for) a financial account, after the date when the financial account was opened.

Field	Description
External ID	The external source ID of the external information about the financial account holder. This field has a limit of 50 characters.
External Source	The source of the external information about the financial account holder, for example, an application name, database name, integration name, and so on. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this financial account holder was last updated (from the external source).

Related Topics

See the following topic for related information:

- Working with the Financial Account Holder Homepage (on page 666)

Financial Account Holdings

Use the Financial Account Holding pages to create, update, and track financial products held by a specific financial account. Financial account holdings are typically the total of all financial account transactions of a single financial product for a financial account.

Financial account holdings enable you to know which financial products are held by each financial account. Financial account holdings can be used to track all types of financial products, such as the following:

- Physical assets (for example, house, art, and car)
- Financial instruments (for example, bond, stock, and mutual fund)
- Financial services and loans (for example, mortgage, line of credit)
- Any other instrument defined by you within financial products

Using financial account holdings, financial institutions can deliver summary information about customer financial accounts from their middle-office or back-office applications. This information provides views that are based on clients or households. Detailed information about the financial account holdings is available to you within Oracle CRM On Demand when you are managing the relationship with the client, such as the quantity, prices, performance, and important dates (such as the purchase date).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial account information, the Financial Account Holding tab might be excluded from your setup.

Working with the Financial Account Holding Homepage

The Financial Account Holding Homepage is the starting point for managing financial account holdings.

NOTE: Your company administrator can customize the layout of your Financial Account Holding Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Financial Account Holding

You can create a financial account holding by clicking the New button in the Recently Modified Financial Account Holdings section. For more information, see Creating Records (on page 51) and Financial Account Holding Fields (on page 671).

Working with Financial Account Holding Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial account holdings.

Financial Account Holding List	Filters
All Financial Account Holdings	All financial account holdings to which you have visibility, regardless of who owns the financial account holding
Recently Modified Financial Account Holdings	All financial account holdings, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Account Holdings

The Recently Modified Financial Account Holdings section shows the financial account holdings that were most recently modified.

To expand the list, click Show Full List.

Adding Sections to Your Financial Account Holding Homepage

If your user role includes the Personalize Homepages privilege, you might be able to add additional sections to your Financial Account Holding Homepage, depending on what your company administrator has set up.

The following procedure describes how to add sections to your Financial Account Holding Homepage.

To add sections to your Financial Account Holding Homepage

1. On the Financial Account Holding Homepage, click Edit Layout.
2. On the Financial Account Holding Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Financial Account Holdings

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related information:

- Financial Account Holding Fields (on page 671)

Financial Account Holding Fields

Use the Financial Account Holding Edit page to add a financial account holding, or update details for an existing, financial account holding. The Financial Account Holding Edit page shows the complete set of fields for a financial account holding.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information about some fields.

Field	Description
Financial Account Holdings Profile	
Financial Account	The financial account associated with the financial account holding.
Financial Product	The financial product associated with the financial account holding.
Financial Account Holdings Name	The unique name of the financial account holding.
Quantity	The number of financial product units of the holdings of this financial product for this financial account. This information usually comes from an external source.
Purchase Price	The purchase price of the holdings of this financial product for this financial account. This information usually comes from an external source.
Purchase Date	The date when the holdings of this financial product for this financial account were purchased. This information usually comes from an external source.
Value	The value of the holdings (that is, the purchase price multiplied by the quantity). This information usually comes from an external source.
Performance	The percentage gain or loss of the holdings of this financial product for this financial account. This information usually comes from an external source.
Financial Account Holdings Integration	
Integration ID	The integration ID of the external information about the financial account holdings. This field has a limit of 50 characters.
External ID	The external source ID of the external information about the financial account holdings. This field has a limit of 50 characters.

Field	Description
External Source	The source of the external information about the financial account holding, for example, an application name, database name, integration name, and so on.
External Last Updated	The date and time when the data for this financial account holding was last updated (from an external source).

Financial Plans

Use the Financial Plan pages to create, update, and track financial plans for a financial account. *Financial plans* are typically the financial plan of a contact or business for one or more specific financial accounts that a financial institution manages.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial-account plan information, the Financial Plan tab might be excluded from your setup.

A financial plan enables high-level financial planning by providing access to information like the status, stage of plan, and approvals. It also provides links to the middle-office and back-office applications. Batch feeds and updates from Web services are commonly used to integrate middle-office and back-office information in Oracle CRM On Demand.

Using financial plans, financial institutions can integrate customer relationship management with financial planning tasks, workflows, and deliverables throughout the entire financial-planning lifecycle. Using this feature, you can track activities, opportunities, service requests and leads for a financial plan to enable client and household-centric financial planning.

You can use the Financial Plan pages to identify and profile a financial plan. You can also use the Financial Plan pages to review a financial plan's subaccounts and other related information including:

- **Opportunity.** For more information, see About Opportunities and Forecasts (on page 309).
- **Activity.** For more information, see Activity Fields (on page 229).
- **Service Request.** For more information, see Process of Managing Service Requests (on page 395).
- **Lead.** For more information, see Leads (on page 242).

Working with the Financial Plan Homepage

The Financial Plan Homepage is the starting point for managing financial plans.

NOTE: Your company administrator can customize the layout of your Financial Plan Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Financial Plan

You can create a financial plan by clicking the New button in the Recently Modified Financial Plans section. For more information, see Creating Records (on page 51) and Financial Plan Fields (on page 674).

Working with Financial Plan Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial plans.

Financial Plan List	Filters
All Financial Plans	All financial plans to which you have visibility regardless of who owns the financial plan.
Recently Modified Financial Plans	All financial plans with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Plans

The Recently Modified Financial Plans section shows the financial plans that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Plan Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Financial Plan Homepage, depending on which sections your company administrator has made available for display on your Financial Plan Homepage.

The following procedure describes how to add sections to your Financial Plan Homepage.

To add sections to your Financial Plan Homepage

1. On the Financial Plan Homepage, click Edit Layout.
2. On the Financial Plan Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Financial Plans

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Working with the Financial Plan Homepage (on page 672)
- Financial Plan Fields (on page 674)

Financial Plan Fields

Use the Financial Plan Edit page to add a financial plan or update details for an existing financial plan. The Financial Plan Edit page shows the complete set of fields for a financial plan.

TIP: You can also edit financial plans on the Financial Plan List page and the Financial Plan Detail page. For more information on updating records, see Updating Record Details

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Financial Plan fields.

Field	Description
Financial Plan Profile	
Financial Plan Name	The name of the financial plan.
Type	The financial plan type. Examples are: retirement, portfolio, wealth, education, and so on.
Financial Account	The financial account with which the plan is associated.
Status	The financial plan status. Examples are: In Process, Active, Approved, Under Review by Management, Under Review by Customer, and so on.
Sent to Contact	Select the check box to indicate whether this financial plan has been sent to the contact.
Approved by Contact	Select the check box to indicate whether this financial plan has been approved by the contact.
Financial Plan Summary	
External Source	The source of the external information about the financial plan, for example, an application name, database name, integration name, and so on. This field is limited to 50 characters.
External Last Updated	The date and time when the data for this financial plan was last updated (from the external source).
Integration ID	The integration ID for this financial plan.
Description	The detailed description of the financial plan. This field is limited to 16350 characters.
Additional Information	

Field	Description
Owner	The owner of the financial plan record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Related Information

See the following topics for related, financial plan information:

- Working with the Financial Plan Homepage (on page 672)
- Managing Financial Plans (on page 673)

Financial Products

Use the Financial Products pages to create, update, and track any type of financial product.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial product information, the Financial Products tab might be excluded from your setup.

A *financial product* in Oracle CRM On Demand can be a specific physical good or service that a financial institution offers to its customers, or a grouping of financial products, but can also refer to any financial product from any financial institution.

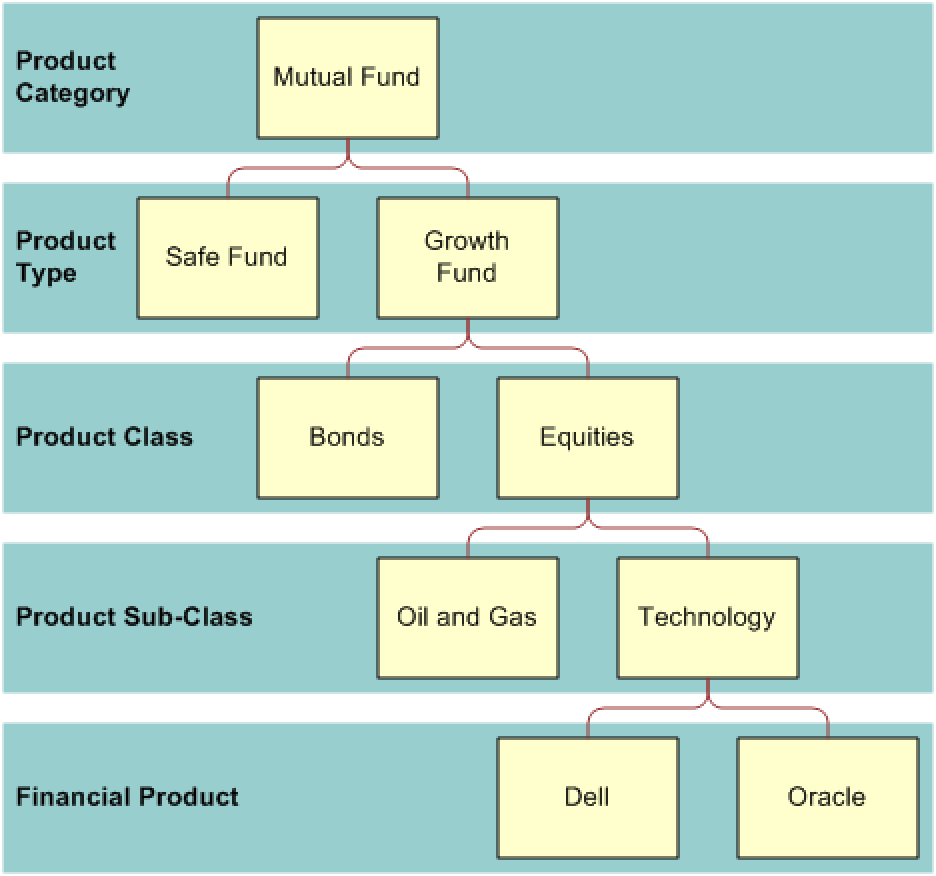
Financial products can be used to track financial product types, such as loans, direct deposits (checking and savings accounts), market interest deposits (or money market accounts), time deposits (or certificates of deposits), and so on. Financial products can also be equities, derivatives, separate accounts, and hedge or mutual funds.

Using financial product records, financial institutions can view the details about financial products, including high-level product details, URL links to financial product Web sites, or catalogs. Using this feature, you can access the latest financial product details and related information about activities, opportunities, service requests, and calendars for your customers.

The financial product record type also supports financial-product hierarchies. These hierarchies allow the grouping of financial products into groups, for example, bundled offerings, mutual funds, or any other multihierarchy or multigrouping that is required.

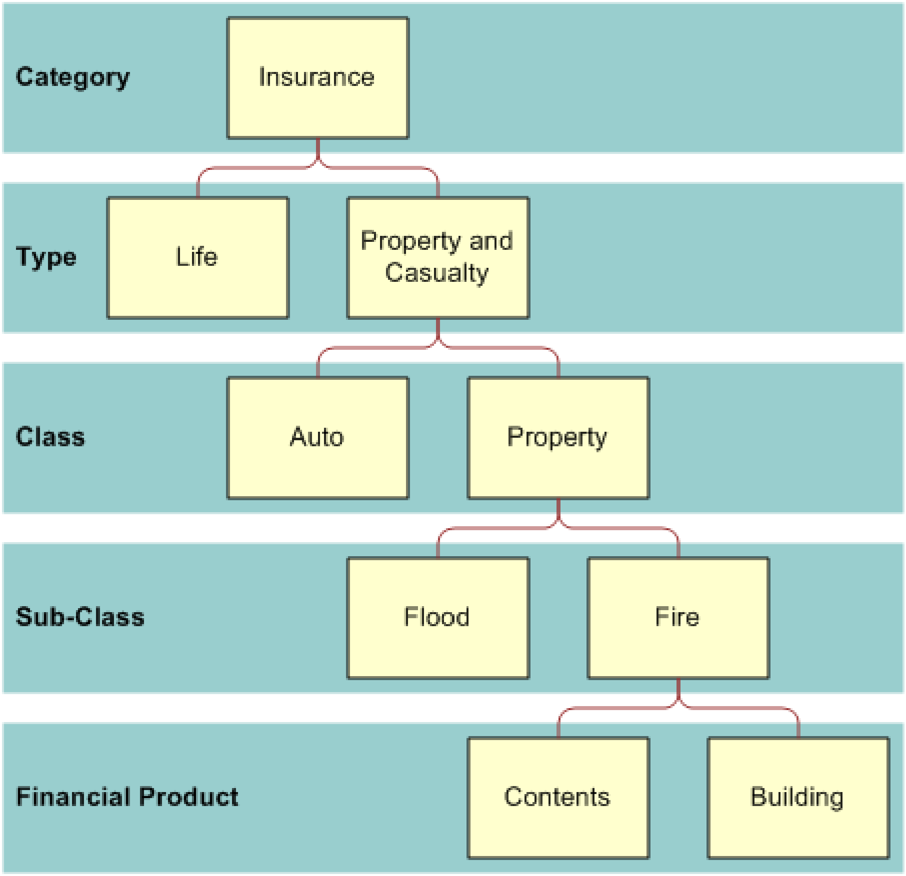
Some examples of financial-product hierarchies are shown in the following figures.

Figure 4 shows an example of a mutual fund hierarchy.



Mutual Fund Hierarchy Example

Figure 5 shows an example of an insurance policy hierarchy.



Insurance Policy Hierarchy Example

Working with the Financial Products Homepage

The Financial Products Homepage is the starting point for managing financial products.

NOTE: Your company administrator can customize the layout of your Financial Products Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Financial Product Record

You can create a financial product record by clicking the New button in the Recently Modified Financial Products section. For more information, see Creating Records (on page 51) and Financial Products Fields (on page 679).

TIP: You can indicate financial product hierarchies, such as an equity that is a subsidiary of a mutual fund by selecting the Parent Financial Product field. For information on financial product hierarchies, see Tracking Parent Financial Products (on page 679).

Working with Financial Product Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial products.

Financial Product List	Filters
All Financial Products	All financial products to which you have visibility regardless of who owns the financial products.
Recently Modified Financial Products	All financial products with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Products

The Recently Modified Financial Products section shows the financial products that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Financial Product Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Financial Product Homepage, depending on which sections your company administrator has made available for display on your Financial Product Homepage.

The following procedure describes how to add sections to your Financial Product Homepage.

To add sections to your Financial Product Homepage

1. On the Financial Product Homepage, click Edit Layout.
2. On the Financial Product Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Financial Products

To manage financial products, do the following task:

- Tracking Parent Financial Products (on page 679)

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related financial product information:

- Working with the Financial Plan Homepage (on page 672)
- Financial Product Fields (see Financial Products Fields on page 679)

Tracking Parent Financial Products

To allow tracking of a financial product's parent-financial product, add the parent financial product to the Parent Financial Product Field on the child financial product.

To track a parent financial product

1. Select the financial product.

   For more information on selecting a financial product, see Finding Records (on page 74).
2. On the Financial Product Detail page, click Edit.
3. On the Financial Product Edit page, select the Parent Financial Product field, and select a financial product.

Financial Products Fields

Use the Financial Products Edit page to add a financial product or update details for an existing financial product. The Financial Products Edit page shows the complete set of fields for a financial product.

TIP: You can also edit financial products on the Financial Products List page and the Financial Products Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Financial Product fields.

Field	Description
Financial Product Profile	
Financial Product Name	Common name of the financial product. Examples are: Oracle Corporation, Mutual Fund X, Gold Saving, Best Mortgage, and so on.
Category	Category of financial product. (The recommended hierarchy is as follows: type, category, class, subclass, financial product, child financial product, more children, if necessary.)
Type	Type of financial product. Examples: Growth Fund, Safe Fund.
Class	Class of financial product. Examples: Equities, Bonds.
Sub-Class	Subclass of the financial product. Examples: Technology, Oil & Gas.
Parent Financial Product	Parent financial product of this product.

Field	Description
Financial Product ID	Financial product ID that the financial institution uses to identify a financial product in its financial product hub or equivalent entity.
MDM Product Hub ID	Financial product ID that the financial industry or external company uses to identify a financial product in an external master data management (MDM) financial product hub.
Current Price	Price of the financial product. The price can come from an external source such as market pricing, or internally, from a price list.
Price Source	Source of the price information for the financial product, for example, an application name, database name, integration name, and so on.
Current Price Last Updated	Date and time when the price for this financial product was last updated (from the price source).
Product Catalog	
Product URL	URL for the catalog location of this financial product. It is usually an external financial product and URL.
Product Overview	Summary or introduction information about the financial product. This field has a limit of 16350 characters.
Product Catalog	URL for a financial product catalog that contains this financial product. The URL is usually an internal financial product URL.
Financial Product Overview	
External ID	External source ID of the external information about the financial-product holder. This field has a limit of 50 characters.
External Source	Source of the external information about the financial product, for example, an application name, database name, integration name, and so on.
External Last Updated	Date and time when the data for this financial product was last updated (from the external source).

Related Topics

See the following topics for related, financial product information:

- Financial Products (on page 675)
- Working with the Financial Products Homepage (on page 677)
- Managing Financial Products (on page 678)

Financial Transactions

Use the Financial Transactions pages to create, update, and track any type of financial transaction for a specific financial account. *Financial transactions* are the individual transactions of a financial account for all financial products.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking financial transaction information, the Financial Transaction tab might be excluded from your setup.

The financial transaction records enable you to determine which financial accounts have which transactions in relation to all financial products. This information provides a complete view of financial transactions, organized by financial account. You can use financial transaction records to track all types of financial product transactions, such as a buy, sell, big ticket, redemption, deposit, withdrawal, and any other instrument defined by you within financial products.

Using financial transactions, financial institutions can deliver summary information from their middle-office or back-office applications about customer financial accounts. This information provides views that are based on clients or households. The detailed information about the financial transactions, such as quantity, prices, and important dates (such as purchase dates) is available to you within Oracle CRM On Demand when you are managing the relationship with the client.

Working with the Financial Transaction Homepage

The Financial Transaction Homepage is the starting point for managing financial transactions.

NOTE: Your company administrator can customize the layout of your Financial Transaction Homepage. In addition, if your user role includes the Personalize Homepages privilege you can add sections to the page, and remove sections from the page.

Creating a Financial Transaction

You can create a financial transaction by clicking the New button in the Recently Modified Financial Transaction section. For more information, see Creating Records (on page 51) and Financial Transaction Fields (on page 682).

Working with Financial Transaction Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for financial transactions:

Financial Transaction List	Filters
All Financial Transactions	All financial transactions to which you have visibility, regardless of who owns the financial transaction
Recently Modified Financial Transactions	All financial transactions, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Financial Transactions

The Recently Modified Financial Transactions section shows the financial transactions that were most recently modified, sorted by the modified date.

To expand the list, click Show Full List.

Adding Sections to Your Financial Transaction Homepage

If your user role includes the Personalize Homepages privilege, you might be able to add additional sections to your Financial Transaction Homepage, depending on what your company administrator has set up.

The following procedure describes how to add sections to your Financial Transaction Homepage.

To add sections to your Financial Transaction Homepage

1. On the Financial Transaction Homepage, click Edit Layout.
2. On the Financial Transaction Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Financial Transactions

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Financial Transaction Fields

Use the Financial Transaction Edit page to add a financial transaction, or to update details of an existing financial transaction. The Financial Transaction Edit page shows the complete set of fields for a financial transaction.

TIP: You can also edit financial transaction information on the Financial Transaction List page and the Financial Transaction Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Financial Transaction Profile	

Field	Description
Financial Account	The financial account with which the financial transaction is associated.
Financial Product	The financial product with which the financial transaction is associated.
Transaction Type	The type of financial transaction. Some examples are: a buy, sell, big ticket, redemption, and so on.
Quantity	The number of financial product units for this financial transaction. This information usually comes from an external source.
Transaction ID	The ID of the financial transaction. This field has a limit of 50 characters.
Transaction Period	The period of the financial transaction. Some examples are: big tickets for date, month, quarter, and so on.
Transaction Price	The price of the financial product for this financial transaction. This information usually comes from an external source.
Transaction Date Time	The date and time of the financial transaction. This information usually comes from an external source.
Value	The value of the financial transaction (that is, the price multiplied by the quantity). This information usually comes from an external source.
Financial Transaction Integration	
Transaction Source	The source that your financial institution uses to identify a financial transaction in the middle-office or back-office application.
Integration ID	The integration ID of the external information about the financial transaction. This field has a limit of 50 characters.
External ID	The external source ID of the external information about the financial transaction. This field has a limit of 50 characters.
External Source	The source of the external information about the financial transaction, for example, an application name, database name, integration name, and so on. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this financial transaction was last updated (from the external source).

11 Insurance

Oracle CRM On Demand provides the following record types for insurance information:

- Claims (on page 688). Use these pages to manage information about insurance claims.
- Coverages (on page 693). Use these pages to manage the monetary limits and risks covered by an insurance policy.
- Damages (on page 697). Use these pages to manage information about damage to the insured property of a contact.
- Insurance Properties (on page 699). Use these pages to manage information about insured property.
- Involved Parties (on page 702). Use these pages to manage information about contacts involved in insurance claims.
- Policies (on page 705). Use these pages to manage information about insurance policies.
- Policy Holders (on page 709). Use these pages to manage information about holders of insurance policies.
- Broker Profile (on page 712). Use these pages to manage information about brokers.

Note: All of these record types are available only with Oracle CRM On Demand Financial Services Edition.

Managing Insurance

To manage insurance, perform the following processes:

- Process of Performing Channel Planning (on page 685)
- Process of Producing Claims First Notice of Loss (on page 686)
- Process of Recruiting and Establishing Agent-Broker Relationships (on page 686)
- Process of Managing Agent-Broker Relationships (on page 686)
- Process of Planning Sales and Budgeting (on page 686)
- Process of Converting Insurance Leads to Clients with the Producer Success Model (see Process of Converting Insurance Leads to Clients with the Producer Success Model on page 687)
- Process of Managing Service Requests (on page 687)
-

Note: Some of these processes are performed in Oracle CRM On Demand, while others are performed outside of Oracle CRM On Demand.

Process of Performing Channel Planning

Channel planning entails developing a strategy and planning activities performed by a channel manager for the channels under his or her responsibility.

To perform channel planning, do the following tasks:

1. Create a business plan, see Business Planning (on page 371).
2. Create objectives for a business plan, see Objectives (on page 380).

3 Manage plan accounts, see Plan Accounts (on page 384).
4 Manage plan contacts, see Plan Contacts (on page 387).
5 Manage plan opportunities, see Plan Opportunities (on page 390).

Process of Producing Claims First Notice of Loss

First notice of loss involves producing customer claims reports, which include information about the claim and claimant. This report includes the coverage verification, which the call center agent provides. The call center agent validates the policy and coverage information.

To create a claims first notice of loss, perform the following tasks:

1 Validate the policy and coverage information provided by the claimant, see Policies (on page 705).
2 Create the claims record, see Claims (on page 688).
3 Enter information about the first notice of loss, see Claims (on page 688).

Process of Recruiting and Establishing Agent-Broker Relationships

Setting up agent-broker relationships includes the planning and execution of marketing campaigns that are targeted at potential agents, as well as setting up new agents.

To recruit new agents and set up agent-broker relationships, perform the following tasks:

1 Create a campaign record, see Creating Records (on page 51) and Campaign Fields (on page 240).
2 Associate potential agents with a campaign, see Targeting Contacts for Campaigns (on page 239).
3 Execute the marketing campaign, see Process of Handling Campaigns (on page 235).
4 Manage applications from agents and approve new agents.
5 Set up the new approved agents, see Creating Records (on page 51) and Partner Fields (on page 423).

Process of Managing Agent-Broker Relationships

Managing agent-broker relationships involves communicating with agents and monitoring agent-broker relationships, updating information about agent demographics, monitoring credentials, book maintenance, and so on.

To manage agent-broker relationships, perform the following tasks:

1 Update information about agents and agencies, see Updating Record Details (on page 115).
2 Monitor credentials for agents and agencies, see Managing Partner Accounts (on page 421).
3 Manage the business plan, see Managing Business Plans (on page 376).
4 Monitor the opportunities and service requests from agents and agencies, see Managing Opportunities (on page 313) and Managing Service Requests (on page 398).

Process of Planning Sales and Budgeting

Insurance sales-planning includes sales planning for the year, quarter, or another period. It also includes managing sales plans, for example, managing sales budgets, managing sales forecasts, and territories.

To plan sales and budgeting, perform the following tasks:

1 Perform the sales planning for the year, quarter, or another period, see Business Planning (on page 371).
2 Manage the sales budgets and quota, see Forecasts (on page 329).
3 Manage the sales forecasts, see Forecasts (on page 329).
4 Manage the territories, see Territory Management (on page 1463).

Process of Managing Service Requests

Managing service requests involves handling general inquiries and resolving single service requests from start to finish. It also includes evaluating service issues and prioritizing requests.

To manage service requests, perform the following tasks:

1. Create the service request, see Service Requests (on page 396).
2. Assign or escalate a service request, see Assigning Service Requests (on page 399) or Escalating Service Requests (on page 400).
3. Work with solutions for a service request, see Adding Solutions to Service Requests (on page 400).
4. Close the resolved service request, see Closing Resolved Service Requests (on page 401).

Process of Converting Insurance Leads to Clients with the Producer Success Model

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

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

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

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

The Producer Success Model uses workflow rules to do the following:

- Create a task to call the lead on the next working day every time a lead record is created.
- Create a follow-up task when a producer updates the value in the Call Result field in the Task Detail page after making a call to a lead or a client.

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

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

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

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

Depending on the result of the calls, the workflow will create different followup tasks. For example, if the result of the call is No Reach, the workflow creates a task to call the same lead or client the next day. If the result of the call is Stay in Touch, the workflow creates a task to call the lead or client six months from now or one week prior to the birthday, whichever is sooner.

NOTE: The Producer Success Model requires the configuration of workflow rules and actions. For details, see the configuration documentation for Oracle On Demand Financial Services Edition.

To convert insurance leads to clients with the Producer Success Model, perform the following tasks:

1. Create a new lead record for the referral.

   A workflow rule automatically creates a task to call the lead on the next working day.
2. In the Activity List page, view the daily call list of referral calls and call the lead, see Working with Activity Lists (on page 203).
3. Record the call result information in the Call Result field.

   Depending on the call result, the workflow creates a followup task.
4. Schedule an appointment to meet the lead, see Scheduling Appointments with Others (on page 218).
5. Meet with the qualified lead and collect additional information.
6. Upgrade the lead to a prospect by selecting Prospect from the Lead Type picklist, see Leads Fields (on page 258).
7. Offer products to meet the prospect's needs and create an opportunity if the customer is interested, see Working with the Opportunity Homepage (on page 311).
8. Conduct a closing interview and sell the products.
9. When the customer purchases the product, upgrade the contact to a client by selecting Client from the Contact Type picklist.
10. On the Contact Detail page, set the Call Frequency field to 1-2 Times/Year. For more information on the Create Task workflow, see Creating Workflow Actions: Create Task (on page 1534).

Claims

Use the Claim pages to create, update, and track any type of claim. Claims are typically the claims of a contact or business that an insurance company manages.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking claims information, the Claims tab might be excluded from your setup.

A *claim* is a formal, written demand to an insurance company to reimburse the loss of, or damage to, an insured object.

Understanding a customer's claim history, including the current claim status, can help sales and service personnel become more knowledgeable about this important aspect of the insurer-customer relationship. Insurers can also use the Claim pages to record critical information quickly regarding the first notice of loss, and accurately route the claim to the appropriate personnel.

The claim record type supports all types of first-notice-of-loss claims, such as auto, property, general liability, and so on. A claim can have parent claims, so all types of claim structures and hierarchies are supported, for example, you can organize claims into claim groups.

You can use the Claim Detail page to identify and capture profile and detailed information about a claim. You can also use the Claim Detail page to review a claim's child claims and other related information including:

- Involved Parties (on page 702)
- Damages (on page 697)
- Activities

  An activity can be related to a claim. You can view all activities related to a claim on the Claim Detail page.
- Service requests

A service request can be related to a claim. You can view all service requests related to a claim on the Claim Detail page.

Working with the Claim Homepage

The Claim Homepage is the starting point for managing claims. This page contains several sections and displays information that is relevant to you.

NOTE: Your company administrator can customize the layout of your Claim Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Claim

You can create a claim by clicking the New button in the Recently Modified Claims section. For more information, see Creating Records (on page 51) and Claim Fields (on page 690).

Working with Claims Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for claims.

Claims List	Filters
All Claims	All claims to which you have visibility, regardless of who owns the claim.
Recently Modified Claims	All claims, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Claims Section

The Recently Modified Claims section shows the claims that were most recently modified, sorted by the modified date. To expand the list, click the Show Full List link. The following procedure describes how to add sections to the Claims Homepage.

Adding Sections to Your Claims Homepage

If your user role includes the Personalize Homepage privilege, you can add additional sections to your Claims Homepage, depending on which sections your company administrator has made available for display on your Claims Homepage.

To add sections to your Claims Homepage

1. On the Claims Homepage, click the Edit Layout link.
2. On the Claims Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Related Information

See the following topics for related claims information:

- Claim Fields (on page 690)
- Managing Claims (on page 690)

Managing Claims

Click a topic to see step-by-step procedures to do the following:

- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Tracking Parent Claims (on page 690)

For additional procedures that are common to all records, see Working with Records (on page 46).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in picklists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all the procedures described in the preceding list.

Related Information

See the following topics for related claims information:

- Working with the Claims Homepage (see Working with the Claim Homepage on page 689)
- Claim Fields (on page 690)

Tracking Parent Claims

To allow tracking of a parent claim, add the parent claim to the Parent Claim field on the child claim record.

To track a parent claim

1 Select the claim.

For information on selecting a claim, see Finding Records (on page 74).

2 On the Claim Detail page, click Edit.

3 On the Claim Edit page, select the Parent Claim field, and select a claim.

Claim Fields

Use the Claim Edit page to add a new claim, or to update details for an existing claim. The Claim Edit page shows the complete set of fields for a claim.

TIP: You can also edit a claim on the Claim List page and the Claim Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Claim Profile	
Claim #	The claim identifier.

Field	Description
Line of Business	The line of insurance business, such as auto, property, general liability, workers compensation, life.
Loss Code	The code for a particular loss, for example, insurance companies can assign 100 for auto accident, 200 for theft, and so on.
Loss Type	The type of the loss, which is related to the loss code. Examples of loss type are: auto accident, theft, and so on.
Report Date	The date when the insured person reported the claim for the accident.
Loss Date and Time	The date of the accident, or the date of the loss.
Currency	The currency for the claim.
Closed Date	The date when the claim was closed.
Event #	The number that identifies an event. Insurance companies typically categorize a catastrophic event. Some examples of event numbers are: 1002 for Hurricane Ike, 1003 for Hurricane Andrew, and so on.
Status	The status of the claim, for example, loss report, open, or reviewed, and closed.
Claim Details	
Kind of Loss	The type of loss, such as fire, theft, injury, wind, flood, hail, or other.
Category of Loss	The category of loss that most insurance companies use to categorize the loss. Some examples are: A. dwelling; B. other structures; C. personal property; D. loss of use.
Location of Loss	The location of the loss, such as in parking garage, in shopping mall, and so on.
Amount of Loss	The loss amount that the customer has incurred. If the total of a given loss exceeds the liability amount, the customer might have to pay the rest.
Liability Source	The source of the liability that caused this claim. Some examples are: injured employee, property of employee damaged, injured private person, property of private person, slip and fall, or vehicular injury.
Amount of Liability	The amount that must be paid if there is a loss.
Relationship to Insured	The relationship of the injured to the insured. Some examples are: employer, supervisor, or colleague.
Place of Injury	The location where the injury occurred.

Field	Description
Date Employer Aware of Injury	The date the employer became aware of an employee injury.
Date Employer Aware of Claim	The date when the employer became aware of an employee claim.
# of People Injured	The number of people injured in the accident. Some of these people might be employees, and some might not.
# of Employee Injured	The number of employees injured in the accident.
Part of Body Injured	The part of the body that is injured, such as hand, leg, neck, and so on.
Type of Injury	The injury type, such as burn, fracture, sprain, repetitive stress.
Medical Injury Code	The code for a particular medical injury, such as IDC-9, IDC-10.
Ability to Work	Indicates whether the employee can still work because of this injury.
Class of Employee	An employee class, such as secretary, manager, and so on.
Injured During Working Hours ?	Indicates whether the injury occurred during working hours or not.
Hospital Name	The name of the hospital that treated the claimant's injury.
Time of Death	The time when the injured person died.
Police/ Coroner Report #	The report number of the police or coroner's report related to a worker’s compensation claim.
Claim Integration	
External System Id	Tracks the external source ID of the external information for this claim. This field has a limit of 50 characters.
External Source	The source of the external information about the claim, for example, an application name, database name, integration name, and so on.
External Last Update	Tracks the date and time of the last external update of data of this claim. The date and time when the data for this policy was last updated (from the external source).
Claim Policy	
Policy	The insurance policy that is linked to this claim.

Field	Description
Reported By	The designation of the person who reported the accident. Some examples are: named insured, driver of insured vehicle, or agent.
Reporter Contact Info	The contact information of the person reporting the accident.
Conditions	The conditions when the accident occurred, such as weather conditions, for example, *It was raining that day.*
At Fault	Identifies who is at fault. Some examples are: insured driver and other driver.
Police/Fire Department	The police or fire station where the report was written.
Report #	The report number that is related to the accident.
Comments	The detailed description of the claim.
Loss Description	The description of the loss, for example, car hit by a truck.
Business Account	The business account that is linked to this claim.
Address	The address where the claim occurred. The address might be different from any other address in Oracle CRM On Demand, and is not related to a contact or business address, or a property address. This address is required and is relevant and appropriate only for this claim record.
City	The city where the claim occurred. The city might be different from any other city in Oracle CRM On Demand, and might not be related to a contact or business city record, or property city. The city name is required and is relevant and appropriate only for this claim record.
State	The state (in jurisdictions such as the United States that use states) or province (in jurisdictions such as Canada that use provinces) where the claim occurred. For example, CA for California, or ON for Ontario.
ZIP/Postal Code	The ZIP code (in the United States) or the postal code (in other jurisdictions) of the location of the accident.

Related Information

See the following topics for related claims information:

- Working with the Claims Homepage (see Working with the Claim Homepage on page 689)
- Managing Claims (on page 690)

Coverages

Use the Coverage pages to create, update, and track any type of insurance coverage. Coverages are typically the monetary limits and risks covered in an insurance policy for a contact.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking coverage information, the Coverage tab might be excluded from your setup.

Coverage is the monetary limits and risks that are covered in an insurance policy. To track coverages for the policies, you add them as coverages to the policy. You can use coverage to track all types of coverage, such as a collision, bodily injury, fire, and so on. You can use the Coverage pages to identify and profile coverages by capturing coverage information, such as the type of coverage, the individual limit, the total limit, deductible values, and so on.

Working with the Coverage Homepage

The Coverage Homepage is the starting point for managing coverage records.

NOTE: Your company administrator can customize the layout of your Coverage Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Coverage Record

You can create a coverage record by clicking the New button in the Recently Modified Coverages section. For more information, see Creating Records (on page 51) and Coverage Fields (on page 695).

Working with Coverage Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for coverages.

Coverage List	Filters
All Coverages	All coverages to which you have visibility, regardless of who owns the coverage.
Recently Modified Coverages	All coverages with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Coverages

The Recently Modified Coverages section shows the coverages you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Coverage Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Coverage Homepage, depending on which sections your company administrator has made available for display on your Coverage Homepage.

To add sections to your Coverage Homepage

1 On the Coverage Homepage, click the Edit Layout link.

2 On the Coverage Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.

3 Click Save.

Related Information

See the following topics for related coverage information:

- Coverage Fields (on page 695)
- Managing Coverages (on page 695)

Managing Coverages

Click a topic to see step-by-step procedures to do the following:

- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)

For additional procedures that are common to all records, see Working with Records (on page 46).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in picklists. Therefore, the information that you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related coverage information:

- Working with the Coverage Homepage (on page 694)
- Coverage Fields (on page 695)

Coverage Fields

Use the Coverage Edit page to add a coverage record, or to update details for an existing coverage record. The Coverage Edit page shows the complete set of fields for a coverage record.

TIP: You can also edit a coverage record on the Coverage List page and the Coverage Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Coverage Profile	
Coverage Name	The unique name of the coverage.
Policy	The policy linked to this coverage.

Field	Description
Coverage	The type of coverage that the customer purchased in the policy to cover his or her liability. Some examples of coverage are: collision, comprehensive, bodily injury, medical payment.
Coverage Status	The status of the coverage, such as Pending, Open, and Closed.
Currency	The currency of the coverage.
Insured Property	The insurance property linked to the coverage record.
Individual Limit	The limit for an individual coverage. For example, the maximum amount that can be paid for a collision coverage might be $100,000.
Total Limit	The total limit that can be paid out. For example, if the insured is involved in a collision between two cars, the total limit that might be paid out under the collision coverage for both cars could be limited to $300,000.
Coverage Product	The insurance product associated with this coverage.
Coverage Detail	
Deductible	The amount that the customer must pay first before the insurance company pays. (The term *deductible* is also known as *excess* in some countries, such as the United Kingdom and Ireland.)
Begin	The date from which the coverage is in effect.
End	The date that the coverage ends.
Insured Amount	The amount that is insured.
Coverage Integration	
External System Id	Tracks the external source ID of the external information about the coverage. This field has a limit of 50 characters.
External Source	The source of the external information about the policy, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the coverage record. This field has a limit of 50 characters.
External Last Update	The date and time when the data for this policy was last updated (from the external source).

Related Information

See the following topics for related coverage information:

- Working with the Coverage Homepage (on page 694)
- Managing Coverages (on page 695)

Damages

Use the Damage pages to identify and capture damage information, such as damage description and damage amount. *Damage* is impairment to property resulting in a loss of value. Damage is used in insurance claims to track the damage to property covered in a policy.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking damages information, the Damage tab might be excluded from your setup.

Working with the Damage Homepage

The Damage Homepage is the starting point for managing damages.

NOTE: Your company administrator can customize the layout of your Damage Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Damage Record

You can create a damage record by clicking the New button in the Recently Modified Damages section. For more information, see Creating Records (on page 51) and Damage Fields (on page 698).

Working with Damage Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for damages.

Damage List	Filters
All Damages	All damages to which you have visibility, regardless of who owns the damage record.
Recently Modified Damages	All damages, sorted by the modified date.

To view a list, click on the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Damages

The Recently Modified Damages section shows the damage records that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Damage Homepage

If your user role includes the Personalize Homepages privilege, you might be able to add additional sections to your Damage Homepage, depending on what your company administrator has made available for display on your Damage Homepage.

The following procedure describes how to add sections to your Damage Homepage.

To add sections to your Damage Homepage

1. On the Damage Homepage, click Edit Layout.
2. On the Damage Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Related Topics

See the following topics for related damages information:

- Damage Fields (on page 698)
- Managing Damages (on page 698)

Managing Damages

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related damage information:

- Working with the Damage Homepage (on page 697)
- Damage Fields (on page 698)

Damage Fields

Use the Damage Edit page to add a damage record, or update the details for an existing damage record. The Damage Edit page shows the complete set of fields for a damage record.

TIP: You can also edit damage records on the Damage List page and the Damage Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Damage Profile	
Claim	The claim linked to the damage record.

Field	Description
Insurance Property	The insured property linked to the damage record.
Damage Name	The unique name of the damage. This field has a limit of 50 characters.
Damaged Property Description	The description of the damaged property, for example, car BMW. This field has a limit of 16,350 characters.
Damage Description	The description of the damage, for example, *front-right light is damaged.* This field has a limit of 16,350 characters.
Currency	The currency for the damage.
Property #	The number of the property, for example, property 1, property 2, and so on. For example, if a policy has three cars, you can number the cars as follows: 1 is Toyota Corolla, 2 is Mazda Miata, and 3 is Hyundai Pony.
Damaged Property Type	The type of property, such as motorcycle, motor home, private passenger, house, and so on.
Estimate Amount	An estimate of the amount of damage on the insured property.
Damage Integration	
External System Id	Tracks the external source ID of the external information about the damage record. This field has a limit of 50 characters.
External Source	The source of the external information about the policy, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the damage record. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this policy was last updated (from the external source).

Related Topics

See the following topics for related damage information:

- Working with the Damage Homepage (on page 697)
- Managing Damages (on page 698)

Insurance Properties

Use the Insurance Properties pages to create, update, and track insurance properties accounts. An insurance properties record allows contacts to be grouped together and their related information to be rolled up from the contacts who are linked to the insurance property.

An *insurance property* is a tangible asset to which a contact or business owner has a legal title. The owner purchases the insurance policy to protect the physical property against loss from theft, fire, and other perils. This term (insurance property) is also used in a claim. The owner can specify which insurance property is damaged in an incident. You can use an insurance property record to track all types of insured property, such as a car, a boat, jewelry, a house, and so on.

You can use the Insurance Property pages to identify and profile insurance property by capturing information such as make, model, construction year, license number, and so on. You can also use the Insurance Property pages to review other related information. For more information, see Coverages (on page 693) and Damages (on page 697).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking insurance property information, the Insurance Properties tab might be excluded from your setup.

Working with the Insurance Property Homepage

The Insurance Property Homepage is the starting point for managing insurance property records.

NOTE: Your company administrator can customize the layout of your Insurance Property Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating an Insurance Property Record

You can create an insurance property record by clicking the New button in the Recently Modified Insurance Properties section. For more information, see Creating Records (on page 51) and Insurance Properties Fields (on page 701).

Working with Insurance Property Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists that are available for insurance properties.

Insurance Property List	Filters
All Insurance Properties	All insurance properties to which you have visibility
Recently Modified Insurance Properties	All insurance properties with your name in the Owner field, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Insurance Properties Section

The Recently Modified Insurance Properties section shows the insurance properties that you viewed most recently.

To expand the list, click Show Full List.

Adding Sections to Your Insurance Property Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Insurance Property Homepage, depending on which sections your company administrator has made available for display on your Insurance Property Homepage.

The following procedure describes how to add sections to your Insurance Property Homepage.

To add sections to your Insurance Property Homepage

1. On the Insurance Property Homepage, click Edit Layout.
2. On the Insurance Property Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Insurance Properties

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Insurance Properties Fields

Use the Insurance Property Edit page to add an insurance property record or update the details of an existing insurance property. The Insurance Property Edit page shows the complete set of fields for an insurance property.

TIP: You can also edit an insurance property on the Insurance Property List page and the Insurance Property Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Property Profile	
Policy	The policy linked to the insurance property.
Sequence	The sequence number for the insurance property. For example, you might have three cars for a policy, sequence number 1 might be for Toyota Corolla, 2 for Mazda Miata, and 3 for a Hyundai car.
Type	The type of the insurance property, such as a motorcycle, a motor home, a private passenger car, a family home, and so on.

Field	Description
Description	A detailed description of the insurance property. This field has a limit of 16,350 characters.
Amount	The amount insured for the insurance property.
Currency	The currency for the insurance property.
Property Integration	
External ID	Tracks the external source ID of the external information about the claim. This field has a limit of 50 characters.
External Source	The source of the external information about the insurance property, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external system. This field has a limit of 50 characters.

Involved Parties

Use the Involved Party pages to create, update, and track any type of involved party. The involved party tracks the relationship between contacts and claims.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking involved party information, the Involved Parties tab might be excluded from your setup.

An *involved party* is a contact involved in an insurance claim. Each contact might have a role in a claim. You can use the Involved Parties tab to track the contact's relationship with the claims. Some examples of the role of contacts in a claim are: claimant, insured driver, and lawyer. You can use the Involved Party pages to identify and profile an involved party.

Working with the Involved Party Homepage

The Involved Party Homepage is the starting point for managing involved parties.

NOTE: Your company administrator can customize the layout of your Involved Party Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating an Involved Party Record

You can create an involved party record by clicking the New button in the Recently Modified Involved Parties section. For more information, see Creating Records (on page 51) and Involved Party Fields (on page 704).

Working with Involved Party Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists.

Involved Party List	Filters
All Involved Parties	All involved parties to which you have visibility, regardless of who owns the involved party.
Recently Modified Involved Parties	All involved parties with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Involved Parties

The Recently Modified Involved Parties section shows the involved parties whom you modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Involved Party Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Involved Party Homepage, depending on which sections your company administrator has made available for display on your Involved Party Homepage.

The following procedure describes how to add sections to your Involved Party Homepage.

To add sections to your Involved Party Homepage

1. On the Involved Party Homepage, click Edit Layout.
2. On the Involved Party Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Involved Parties

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Involved Party Fields

Use the Involved Party Edit page to add an involved party, or update the details of an existing involved party. The Involved Party Edit page shows the complete set of fields for an involved party.

TIP: You can also edit an involved party on the Involved Party List page and the Involved Party Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the Involved Party fields.

Field	Description
Involved Party Profile	
Claim	The claim linked to this involved party.
Contact	Contact name for the claim.
Involved Party Name	The unique name of the involved party.
Role	The role of the contact in the claims. Some examples are: adverse claimant, claimant, witness, lawyer, and insured spouse.
Currency	The currency for the involved party.
Role in Accident	The role of the involved party in the accident. Some examples are: driver, passenger, and pedestrian.
Location	The location of the claimant when the accident happened. Some examples are: in involved vehicle, in uninvolved vehicle, and pedestrian.
Involved Party Details	
Injury Summary	The summary of the injury to the involved party. This field has a limit of 250 characters.
Injury Description	The detailed description of the injury to the involved party. This field has a limit of 16,350 characters.
Involved Party Integration	
External System ID	Tracks the external source ID of the external information about the involved party. This field has a limit of 50 characters.

Field	Description
External Source	The source of the external information about the involved party, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the involved party.
External Last Update	The date and time at which the data for this involved party was last updated (from the external source).

Policies

Use the Policy pages to create, update, and track any type of insurance policy. Policies are generally the policies of a contact or business that the insurance company manages, but can also track all policies of a contact or business, including those at other insurance companies.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking policy information, the Policy tab might be excluded from your setup.

A *policy* is a written agreement between the insurer and the policy holder, in which the insurer commits to providing the insurance benefit on the occurrence of an insurable event, and in which the policyholder commits to paying the premium. Policies provide a structure for insurers to manage both contact and business relationships.

The policy record type enables insurers to move from policy-centric relationships to client and household-centric relationships by having access to high-level policy information. The policy information (for example, type, status, and effective date within Oracle CRM On Demand) supports engagements of client-household centric relationships, such as activities, claims, and calendar. You can use the policy record type to track all types of policies, such as auto, property, general liability, and other types of policies. A policy can have parent policies, thus all types of policy structures and hierarchies are supported. These policy hierarchies support the grouping of policies into policy groups, providing the flexibility to enable any policy structure that is required.

Profile and Related Information About Policies

You can use the Policy pages to identify and capture profile and detailed information about a policy. You can also use the Policy pages to review a policy's child policies and other related information including:

- Policy Holders (on page 709)
- Claims (on page 688)
- Insurance Properties (on page 699)
- Coverages (on page 693)
- **Activities.** An activity can be related to a policy. On the Policy Homepage you can display activities related to a policy. For more information, see Working with the Policy Homepage (on page 705).
- **Service requests.** A service request can be related to a policy. On the Policy Homepage, you can display service requests related to a policy. For more information about service requests, see Service Requests (on page 396).

Working with the Policy Homepage

The Policy Homepage is the starting point for managing policies.

NOTE: Your company administrator can customize the layout of your Policy Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Policy

You can create a policy by clicking the New button in the Recently Modified Policy section. For more information, see Creating Records (on page 51) and Policy Fields (on page 707).

Working with Policy Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for policies.

Policy List	Filters
All Policies	All policies to which you have visibility, regardless of who owns the record
Recently Modified Policies	All policies with your name in the Owner field, sorted by the modified date.
My Policies	Policies with your name in the Owner field.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Policies

The Recently Modified Policies section shows the policies that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Policy Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Policy Homepage, depending on which sections your company administrator has made available for display on your Policy Homepage.

The following procedure describes how to add sections to your Policy Homepage.

To add sections to your Policy Homepage

1. On the Policy Homepage, click Edit Layout.
2. On the Policy Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Managing Policies

To manage policies, do the following task: Tracking Parent Policies (on page 707).

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)

- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Working with Attachments (on page 161)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Tracking Parent Policies

To allow tracking of a policy's parent policy, add the parent policy to the Parent Policy Field on the child policy.

To track a parent policy

1. Select a policy.

   For information on selecting a policy, see Finding Records (on page 74).
2. On the Policy Detail page, click Edit.
3. On the Policy Edit page, select the Parent Policy field, and select a policy.

Policy Fields

Use the Policy Edit page to add a policy or update the details of an existing policy. The Policy Edit page shows the complete set of fields for a policy.

You can also edit a policy record on the Policy List page and the Policy Detail page. For more information on updating records, see Updating Record Details (on page 115).

TIP: You can indicate policy hierarchies, in which a policy is a child of another policy, by selecting a parent policy within a policy record. For information on tracking parent policies, see Tracking Parent Policies (on page 707).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some of the policy fields.

Field	Description
Policy Profile	
Policy #	The policy number that is usually generated by the policy system.
Policy Type	The type of the policy, such as auto, property, general liability, workers compensation, or life.
Status	The policy status, such as new business, in force, pending, terminated, renewal, or quote.
Sub Status	The policy substatus, such as not submitted, broker review, cancelled, or expired.

Field	Description
Currency	The currency for the policy.
Effective Date	The date from which the policy is effective.
Expiration Date	The date when the policy expired.
Cancelled Date	The date when the policy was cancelled.
Rate State	The rate that can be applied to a policy in a particular state.
Rate Plan	The rate plan for this policy. Each insurance company might have different rate tiers for a policy. Some example values are: 01, 02, 03, and so on.
Owner	The owner of the policy record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
Policy Integration	
External System ID	Tracks the external source ID of the external information about the policy. This field has a limit of 50 characters.
External Source	The source of the external information about the policy, for example, an application name, database name, integration name, and so on.
Integration ID	Tracks the integration ID of the external information about the policy. This field has a limit of 50 characters.
External Last Updated	The date and time at which the data for this policy was last updated from the external source.
Policy Agent	
Primary Agency	The primary agency that initiated the policy.
Primary Agent	The primary agent who handles this policy.
Referral Source	The referral source, such as the Internet, direct mail, magazine ad, and client referral.

Field	Description
Producer Code	The code for the producer who brought this policy to the insurer.
Face Amount	The amount stated on the insurance policy to be paid upon death or maturity.
Total Premium	The total premium for this policy.
Billing Status	The status of the policy billing, such as billed, lapsed, or paid.
Invoice Due Date	The date the policy invoice is due.
Term	The term of the policy, for example, 1 year, 2 year, and so on.
Policy Pay Method	The method that the customer uses to pay for the policy, such as cash, charged, check, or electronic fund transfer.

Policy Holders

Use the Policy Holder pages to create, update, and track any type of policy holder. A *policy holder* is typically the contact who owns the policy that the insurance company manages.

A policy holder record is used to track the relationship between contacts and policies. It captures all types of roles that the contact can have in a policy. Example roles are: insured, primary driver, beneficiary, and so on. You can create other roles, as needed. For information about setting up fields and field values, see Creating and Editing Fields (on page 1219).

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking policy holder information, the Policy Holders tab might be excluded from your setup.

Working with the Policy Holder Homepage

The Policy Holder Homepage is the starting point for managing policy holders.

NOTE: Your company administrator can customize the layout of your Policy Holder Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Policy Holder

You can create a policy holder by clicking the New button in the Recently Modified Policy Holders section. For more information, see Creating Records (on page 51) and Policy Holder Fields (on page 711).

Working with Policy Holder Lists

Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for policy holders.

Policy Holder List	Filters
All Policy Holders	All policy holders to which you have visibility, regardless of who owns the policy holder
Recently Modified Policy Holders	All policy holders, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, so you cannot edit or delete them.

Viewing Recently Modified Policy Holders

The Recently Modified Policy Holders section shows the policy holders that were modified most recently.

To expand the list, click Show Full List.

Adding Sections to Your Policy Holder Homepage

If your user role includes the Personalize Homepages privilege, you can add additional sections to your Policy Holder Homepage, depending on which sections your company administrator has made available for display on your Policy Holder Homepage.

The following procedure describes how to add sections to your Policy Holder Homepage.

To add sections to your Policy Holder Homepage

1. On the Policy Holder Homepage, click Edit Layout.
2. On the Policy Holder Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Related Topics

See the following topics for related information:

- Managing Policy Holders (on page 710)
- Policy Holder Fields (on page 711)

Managing Policy Holders

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Topics

See the following topics for related information:

- Working with the Policy Holder Homepage (on page 709)
- Policy Holder Fields (on page 711)

Policy Holder Fields

Use the Policy Holder Edit page to add a policy holder, or to update details of an existing policy holder. The Policy Holder Edit page shows the complete set of fields for a policy holder.

TIP: You can also edit policy holder information on the Policy Holder List page and the Policy Holder Detail page. For more information on updating records, see Updating Record Details (on page 115).

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

The following table provides additional information regarding some fields.

Field	Description
Policy Holder Profile	
Policy	The policy linked to this policy holder.
Contact Holder	The contact name for the policy.
Policy Holder Name	The unique name of the policy holder.
Role	The role of the contact in this policy. Some example roles are: insured, primary driver, and beneficiary.
Currency	The currency of the policy holder.
Insured Type	The insured type for each contact in the policy, such as primary, or secondary.
Percentage	The percentage of the policy that the holder owns. For example, for a life policy, customers can receive the proceeds of the policy, based on this percentage.
Policy Holder Integration	
External System ID	The external source ID of the external information about the policy holder. This field has a limit of 50 characters.
External Source	The source of the external information about the policy holder, for example, an application name, database name, integration name, and so on. This field has a limit of 50 characters.

Field	Description
Integration ID	The integration ID of the external information about the policy holder. This field has a limit of 50 characters.
External Last Updated	The date and time when the data for this policy holder was last updated (from the external source).

Related Topics

See the following topic for related information:

- Working with the Policy Holder Homepage (on page 709)

Broker Profile

The Broker Profile tab represents any insurance broker who sells or services insurance products. Every year, the channel manager usually meets with each broker and creates a new broker profile for the year. The broker profile captures demographic information about a broker for a particular year.

The Broker Profile pages in Oracle CRM On Demand enable you to capture demographic information about the partner, such as the broker name, address, phone numbers, fax number, Web site, revenue, description of business, and so on. The broker profile is a child of the partner. For more information about partners, see Partners (on page 419).

Working with the Broker Profiles Homepage

The Broker Profile Homepage is the starting point for managing broker profiles.

NOTE: Your company administrator can customize the layout of your Broker Profile Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Broker Profile

You can create a broker profile by clicking the New button in the Recently Modified Broker Profile section. For more information, see Creating Records (on page 51) and Broker Profile Fields (on page 713).

Working with Broker Profiles Lists

The Broker Profiles Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for broker profiles.

Broker Profile List	Description
All Broker Profiles	Displays all records to which you have visibility, regardless of who owns the list. It does not filter broker profiles.
Recently Modified Broker Profiles	Filters all broker profiles, sorted by the modified date.
All National Broker Profiles	Filters all broker profiles where Sub Channel is set to National.

Broker Profile List	Description
My Broker Profiles	Filters broker profiles with your name in the Owner field.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only, therefore you cannot edit or delete them.

Viewing My Recently Modified Broker Profiles Section

The My Recently Modified Broker Profiles section shows the broker profile requests that you own and were recently modified. To expand the list, click Show Full List.

Adding Sections to Your Broker Profiles Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Broker Profiles Homepage:

- Broker Profiles Lists
- My Recently Modified Broker Profiles
- My Broker Profiles
- All National Broker Profiles.

To add sections to the Broker Profiles Homepage

1. On the Broker Profiles Homepage, click Edit Layout.
2. On the Broker Profiles Homepage Layout page, click the arrows to add or remove sections and to organize the sections on the page. Then click Save.

Managing Broker Profiles

For additional procedures that are common to all records, see Working with Records (on page 46).

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Broker Profile Fields

Use the Broker Profile Edit page to add a broker profile or update details for an existing broker profile. The Broker Profile Edit page shows the complete set of fields for a broker profile.

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names of record types, fields, and options in lists. So, the information you see might differ from the standard information, described in this table.

The following table provides additional information regarding some fields.

Field	Description
Demographic Information	
Broker Profile Name	The name of the broker profile. To avoid duplicate records, make sure that you follow the naming conventions that your company has set up for abbreviations, capitalization, and so on.
Partner	The name of the broker who has this profile.
Sub Channel	The description of the broker coverage. The options include: Globals, Locals, Nationals, Regionals, and Wholesalers.
Segmentation	The description of the broker segmentation. The options include: Commercial, Growth, and Retail.
Broker Profile Year	The year during which a broker profile is valid.
Phone Number	The phone number of the broker.
Fax Number	The fax number for the broker.
Website	The URL address for the broker.
Country	The country in which the broker is based.
Address 1	The address of the broker location.
Address 2	The address of the broker location.
City	The city in which the broker is based.
Province	The state (in jurisdictions such as the United States that use states) or province (in jurisdictions such as Canada that use provinces) where the broker is located, for example, *CA* for California, or *ON* for Ontario.
Post Code	The ZIP code (in the United States) or the postal code (in other jurisdictions) of the location of the broker.
Miscellaneous	
Company Overview	Overview of the broker.

Field	Description
Company Historic and Future Growth	The description of the broker history and future growth.
Territory/Regional Structure	The description of the broker territory and regional structure.

12 Automotive

Oracle CRM On Demand provides the following record types that provide automotive information:

- **Vehicles.** Use these pages to track the sales history and service history of vehicles.
- **Dealers.** Use these pages to manage dealer information.

Note: These record types are available only with Oracle CRM On Demand Automotive Edition.

Dealers

Use the Dealers home pages to create, update, and track dealer records.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking dealer information, the Dealer tab might be excluded from your setup.

Working with the Dealer Homepage

The Dealer Homepage is the starting point for managing dealers.

NOTE: Your company administrator can customize the layout of your Dealer Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page, and remove sections from the page.

Creating a Dealer

You can create a dealer by clicking the New button in the My Recently Viewed Dealers section. For more information, see Creating Records (on page 51) and Dealer Fields (on page 719).

Working with Dealer Lists

The Dealer Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for dealers.

Dealer List	Filters
All Dealers	All dealers to which you have visibility regardless of who owns the dealer.
My Dealers	Dealers with your name in the Owner field.
Recently Modified Dealers	All dealers with your name in the Owner field, sorted by the modified date.

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Dealers

The My Recently Viewed Dealers section shows the dealers that you viewed most recently.

To expand the list, click Show Full List.

Viewing Dealer-Related Opportunities

The Dealer-Related Opportunities section shows the top opportunities that are assigned to you.

To expand the list of dealer-related opportunities, click Show Full List.

Adding Sections to Your Dealer Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Dealer Homepage:

- Recently Created Dealers
- Recently Modified Dealers
- My Recently Created Dealers
- My Recently Modified Dealers
- One or more report sections (your company administrator can make report sections available for display on your Dealer Homepage)

To add sections to your Dealer Homepage

1. On the Dealer Homepage, click Edit Layout.
2. On the Dealer Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Related Information

See the following topics for related dealer information:

- Dealer Fields (on page 719)
- Managing Dealers (on page 718)

Managing Dealers

To manage dealers, do the following tasks:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Transferring Ownership of Records (on page 145)
- Adding Notes (on page 157)
- Attaching Files and URLs to Records (on page 163)
- Deleting and Restoring Records (on page 173)
- Managing Calendars and Activities (on page 196)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

Related Information

See the following topics for related dealer information:

- Dealers (on page 717)
- Dealer Fields (on page 719)
- Working with the Dealer Homepage (on page 717)
- Analytics (on page 789)

Dealer Fields

Use the Dealer Edit page to add a dealer or update details for an existing dealer. The Dealer Edit page shows the complete set of fields for a dealer.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Dealer Information	
Name	Name of the automobile dealer. Limit of 100 characters.
Phone number	The dealer's phone number.
Dealer Type	The dealer type, for example, Truck Dealer. Limit of 20 characters.
Site	The dealer's Web site. Limit of 50 characters.
E-mail	The dealer's contact email address. Limit of 50 characters.
NOTE: The following Billing and Shipping address fields are not available by default. Your company administrator must set them up on the Dealer Detail page as part of an additional section. For more information on setting up Detail pages, see Customizing Static Page Layouts (on page 1267).	
Billing Address 1, 2, 3	The dealer's billing address. **NOTE:** If shared addresses are set up for your company, the billing address is read-only, and the address fields change to meet the requirements for shared addresses. For more information on shared addresses, see Addresses.
Billing City	None.

Field	Description
Billing Country	The country specified in the dealer's billing address. The default valid values are the names of all the countries in the world. The valid value for the U.S. is *USA.* Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data. For more information, see About Countries and Address Mapping (on page 1615).
Billing PO Box/ Sorting Code	If your file contains non-U.S. addresses, then map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township. For more information, see About Countries and Address Mapping (on page 1615).
Billing Province	If your file contains non-U.S. addresses, then map the following address items or their equivalents for the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast. For more information, see About Countries and Address Mapping (on page 1615).
Billing US State	The default valid values are standard two-letter abbreviations for all the U.S. states, which take all capital letters. Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data.
Billing Zip/Post Code	None.
Shipping Address 1, 2, 3	The dealer's shipping address. For information on how to map address fields on a country-by-country basis, see About Countries and Address Mapping. (see About Countries and Address Mapping on page 1615) **NOTE:** If shared addresses are set up for your company, the shipping address is read-only, and the address fields change to meet the requirements for shared addresses. For more information on shared addresses, see Addresses.
Shipping City	None.
Shipping Country	The default valid values are the names of all the countries in the world. The valid value for the U.S. is *USA.* Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data. For more information, see About Countries and Address Mapping (on page 1615).
Shipping PO Box/ Sorting Code	If your file contains non-U.S. addresses, then map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township. For more information, see About Countries and Address Mapping (on page 1615).
Shipping Province	If your file contains non-U.S. addresses, then map the following address items or their equivalents for the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast. For more information, see About Countries and Address Mapping (on page 1615).

Field	Description
Shipping US State	The default valid values are standard two-letter abbreviations for all the U.S. states, which take all capital letters. Oracle CRM On Demand does not allow you to modify the valid values for this field. Make sure the import data matches the valid values for this field before importing any data.
Shipping Zip/Post Code	None.
Additional Information	
Status	The status of the dealer, for example, Active.
Parent Dealer	The parent dealer of the current dealer record.
Currency	The currency of issue.
Ranking	The ranking of a dealer relative to other dealers, typically for sales or service purposes. Limit of 22 characters.
Owner	The owner of the dealer record. Generally, the owner of a record can update the record, transfer the record to another owner, or delete the record. However, your company administrator can adjust the access levels to restrict or expand a user's access. The value in the Owner field affects which records are included in reports that you or your managers run in the Analytics pages. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).
URL	The dealer's Universal Resource Locator (URL). Limit of 100 characters.
Parent Site	Parent dealer's Web site. Limit of 50 characters.
Stage	The phase of the application and contracting process for the dealer. Default values are: Active, Application Pending, Candidate, and Contract Pending.

Custom Fields

NOTE: Company administrators, whose role includes the Customize Application privilege, typically create custom fields.

Any custom field that is created in an Account record appears as the same custom field in the Dealer record, because a Dealer record inherits a custom field in an Account record. However, any custom field that is created in a Dealer record does not automatically appear in the Account record.

If you want to see the same custom field in both the Account view and the Dealer view, your company administrator can create the custom field in the Account record, and make it visible to both the Account view and the Dealer view.

If you do not want to see the same custom field in both the Account view and the Dealer view, your company administrator can create the Account-specific custom field in the Account record, and make the custom field visible only in the Account view.

For more information on custom fields, see About Custom Fields (on page 1208).

Related Information

See the following topics for related Dealer information:

- Dealers (on page 717)
- Working with the Dealer Homepage (on page 717)
- Managing Dealers (on page 718)

Vehicles

Use the Vehicles pages to create, update, and track vehicles.

NOTE: Your company administrator determines which tabs are available to you. If your job responsibility does not include tracking vehicle information, the Vehicles tab may be excluded from your setup.

Working with the Vehicle Homepage

The Vehicle Homepage is the starting point for managing vehicles.

NOTE: Your company administrator can customize the layout of your Vehicle Homepage. In addition, if your user role includes the Personalize Homepages privilege, you can add sections to the page and remove sections from the page.

Creating a Vehicle

You can create a vehicle by clicking the New button in the My Recently Viewed Vehicles section. For more information, see Creating Records (on page 51) and Vehicle Fields (on page 729).

Working with Vehicle Lists

The Vehicle Lists section shows a number of lists. Oracle CRM On Demand comes with a set of standard lists. All standard lists are public. You and your managers can create additional lists that are based on different criteria.

The following table describes the standard lists for vehicles.

Vehicle List	Filters
All Vehicles	All vehicles, sorted by the vehicle identification number (VIN)
All Recently Modified Vehicles	All vehicles, sorted by the modified date

To view a list, click the list name.

To create a new list, click New. For more information about creating lists, see Creating and Refining Lists (on page 130).

To review all available lists, create a new list, or view, edit, or delete an existing list, click Manage Lists. The Manage Lists page also includes the standard lists delivered with Oracle CRM On Demand. These lists are view-only. So, you cannot edit or delete them.

Viewing Recently Modified Vehicles

The My Recently Modified Vehicles section shows the vehicles that you viewed most recently.

Viewing Vehicle-Related Service Requests

The Vehicle-Related Service Request section shows this information:

- **Service Number.** The service requests assigned to you. Click SR Number to review the service request.
- **Subject.** The title of the service request.
- **Asset.** The asset corresponding to the service request.
- **Show Full List.** Expands the list of vehicle-related service requests.

To expand the list, click Show Full List.

Adding Sections to Your Vehicle Homepage

If your user role includes the Personalize Homepages privilege, you can add some or all of the following sections to your Vehicle Homepage:

- Recently Created Vehicles
- Recently Modified Vehicles
- My Recently Created Vehicles
- My Recently Modified Vehicles
- One or more report sections (Your company administrator can make report sections available for display on your Vehicle Homepage.)

Complete the following task to add sections to the Vehicle Homepage.

To add sections to your Vehicle Homepage

1. On the Vehicle Homepage, click Edit Layout.
2. On the Vehicle Homepage Layout page, click the arrows to add or remove sections, and to organize the sections on the page.
3. Click Save.

Related Information

See the following topics for related Vehicle information:

- Vehicle Fields (on page 729)
- Managing Vehicles (on page 723)

Managing Vehicles

The following topics describe optional configuration that can be performed by your company administrator when managing vehicles in Oracle CRM On Demand:

- Enabling a Vehicle Product Type (on page 725)
- Enabling Vehicle Association on Service Requests (on page 724)

Click a topic to see step-by-step procedures to do the following:

- Updating Vehicle Ownership (on page 726)
- Tracking Service requests for Vehicles (on page 725)
- Tracking Sales Histories of Vehicles (on page 727)
- Tracking Service Histories of Vehicles (on page 727)
- Tracking Financial Information for Vehicles (on page 728)

NOTE: This feature is not part of the standard application, so it might not be available in your version of Oracle CRM On Demand.

For step-by-step procedures that are common to many record types, see:

- Creating Records (on page 51)
- Updating Record Details (on page 115)
- Linking Records to Your Selected Record (on page 117)
- Working with Lists (on page 125)
- Working with Records (on page 46)
- Adding Notes (on page 157)
- Transferring Ownership of Records (on page 145)
- Tracking Assets (on page 278) (includes linking vehicles to accounts)
- Attaching Files and URLs to Records (on page 163)
- Viewing Audit Trails for Records (on page 175)
- Deleting and Restoring Records (on page 173)
- Tracking Assets (on page 278) (includes linking vehicles to accounts)
- Renaming Record Types (on page 1343)

NOTE: Company administrators can customize Oracle CRM On Demand in a variety of ways, such as changing the names for record types, fields, and options in lists. So, the information you see might differ from the standard information described in the online help.

Also, depending on the access level that you have, you might not be able to perform all procedures described in the preceding list.

TIP: In the standard application, vehicles are included in the lists of portfolio accounts in Oracle CRM On Demand. However, if your administrator selects the Exclude Vehicle/Assets Records from Portfolio Accounts check box on the company profile, then vehicles are not included in the lists of portfolio accounts.

Related Information

See the following topics for related Vehicle information:

- Vehicles (on page 722)
- Vehicle Fields (on page 729)
- Working With the Vehicle Homepage (on page 722)
- Analytics (on page 789)

Enabling Vehicle Association on Service Requests

The default service request layout does not display vehicle association. However, your company administrator can configure a custom service request page layout by completing the following procedure.

To display vehicle association on a service requests record

1. From any page, click Admin, click Application Customization, click Service Requests, and click Service Request Page Layout.
2. In the Page Layout list, do one of the following:
   - Click the Edit link for an existing layout to modify it.
   - Click the New Layout button to create a new layout.
   - Click the Copy link to copy an existing layout.

   The Page Layout Wizard is displayed.

NOTE: The number of steps in the Page Layout Wizard can differ depending on the Page Layout link that you click.

3. In Step 1 Layout Name, enter a name for the layout and a description (optional).
4. In Step 2 Field Setup, select the field characteristics as necessary.
5. In Step 3 Field Layout, make sure that the Vehicle field is available on the Service Request Page Layout.
6. Click Finish to exit the Wizard.

   You now must assign the new custom layout to a user role, using the Role Management Wizard.
7. Click Admin, click User Management and Access Controls, then click Role Management:
8. Find the role to which you want to assign the custom service request page layout, and click Edit.
9. In Step 6 of the wizard, change the Page Layout Name to the custom service request page layout for the service request record.
10. Click Finish to exit the wizard.

NOTE: By enabling Vehicle association, you can also update the Vehicle Search page layout to alter the association selection that a user sees. For more information, see Managing Search Layouts (on page 1296).

Enabling a Vehicle Product Type

Normally, to add products, your company administrator uses the Content Management portion of the Admin tool. For Vehicles, the administrator can update the product record with the Product Type field set to Vehicle. Note that the Product Type for Vehicle records is not displayed in the product default layout. To enable the Product Type for a vehicle, your company administrator can create a custom product page layout by completing the steps in the following procedure.

To display the product type for a vehicle record

1. From any page, click Admin, click Application Customization, click Product, click Product Page Layout, and copy the Product Page Standard Layout to a new layout.
2. Complete the Page Layout Wizard for the Product:
   a. In Step 1, provide a name for your layout.
   b. In Step 2, check the Required box for the Product Type.
   c. In Step 3, make sure that the Product Type field is listed in the Key Product Information section on the right.
   d. Click Finish to exit the wizard.
3. Assign the new custom layout to a user role as required using the Role Management Wizard.
   a. Click Admin, click User Management and Access Controls, then click Role Management:
   b. Find the role that you want to assign to the custom product page layout and click Edit.
   c. In Step 6 of the wizard, change the Page Layout Name to the custom product page layout for the Product record.
   d. Click Finish to exit the wizard.

   The user whose role has been modified can create a product record with the Product Type field by using the Content Management functionality. For more information on adding products, see Setting Up Company Products (on page 1855).

For more information, see Setting Up Company Products (on page 1855).

Tracking Service Requests for Vehicles

When you want to review, update, or create a service request for a vehicle, update the vehicle record or create the service request for the associated vehicle.

To track the service request for a vehicle

1. Select the vehicle that you want to track.

   For more information on selecting vehicles, see Finding Records (on page 74).
2. On the Vehicle Detail page, scroll down and click New in the Service Request title bar.

   NOTE: When creating a service request, selecting a dealer allows the user to change from all contacts search to contacts for the related dealer. You can change the filter to run a query as you require.
3. On the Service Request Edit page, fill in the information.

The following table describes some field information for service histories.

Field	Comments
Service Number	Oracle CRM On Demand generates this number.
Subject	The title or short description of this activity.
Priority	The priority of the service request, such as 1-ASAP, 2-High, or 3-Medium.
Status	The status of the service request, such as Opened, Pending, or Closed.
Opened Time	Indicates the time when the service request was opened. Oracle CRM On Demand generates this number.
Contact	The contact related to the service request.
Dealer	The dealer related to the service request.
Owner	The owner of the service request.

NOTE: When creating a service request, selecting a dealer changes all contacts to only those contacts who are associated with the dealer by default. The filter can be changed to query all contacts.

Updating Vehicle Ownership

When a vehicle is sold, update the vehicle record to track the vehicle ownership.

1. Select the vehicle.

   For instructions on selecting vehicles, see Finding Records (on page 74).
2. On the Vehicle Detail page, click Edit in the title bar.

   For information on the fields in the Vehicle Details page, see Vehicle Fields (on page 729).
3. On the Vehicle Edit page, update the Owned By field in the Vehicle record.
4. Save the record:
   - To save this record and then open the Vehicle Detail page (where you can link information to this record), click Save.
   - To save this record and then open the Edit page (where you can create another vehicle record), click Save & New Vehicle.

Tracking Sales Histories of Vehicles

When you want to review, update, or create a sales history for a vehicle, update the vehicle record.

To track the vehicle's sales history

1. Select the vehicle.

   For instructions on selecting vehicles, see Finding Records (on page 74).
2. On the Vehicle Detail page, scroll down to the Sales History section, and click Add in the title bar.

   NOTE: If the Sales History section is not visible on your Vehicle Detail page, click the Edit Layout link in the upper right corner of the page, and add the Sales History section to your page layout. If the section is not available to add to your page layout, contact your company administrator.
3. On the Sales History Edit page, fill in the information.

   The following table describes some field information for sales histories.

Field	Comments
Sales Number	System-generated number.
Currency Code	Defaults to your currency.
Owner First Name	When you select the last name, this field is filled in.
Owner Last Name	Owner of the vehicle.

4. Save the record.

Tracking Service Histories of Vehicles

When you want to review, update, or create a service history for a vehicle, update the vehicle record. The service history can include service requests and other services related to the vehicle.

To track the vehicle's service history

1. Select the vehicle.

   For instructions on selecting vehicles, see Finding Records (on page 74).
2. On the Vehicle Detail page, scroll down and click Add in the Service History title bar.

   NOTE: If the Service History section is not visible on your Vehicle Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Service History section to your page layout. If the section is not available to add to your page layout, contact your company administrator.
3. On the Service History Edit page, fill in the information.

   The following table describes some field information for service histories.

Field	Comments
SH #	Service History number which has a limit of 30 characters. Oracle CRM On Demand generates this number.

Field	Comments
SR #	Service request record linked to this service history. Limit of 64 characters.
Owner Last Name	Owner of the vehicle. Limit of 50 characters.
Service Date	Default is today's date.
Currency Code	Defaults to your currency. Limit of 20 characters.
Service Name	A name or number linked with the service history record. Limit of 100 characters.
Make	The manufacturer or brand name of the vehicle. Read-only.
Owner First Name	When you select the last name, this field is filled in. Limit of 50 characters.
Service Provider	Dealer or other service provider who serviced the vehicle. Limit of 100 characters.
Description	This field has a limit of 16,350 characters.

4 Save the record.

Tracking Financial Information for Vehicles

You can track the financial information for a vehicle.

To track the financial information for a vehicle

1 Select the vehicle.

For instructions on selecting vehicles, see Finding Records (on page 74).

2 On the Vehicle Detail page, scroll down and click Add in the Financial Information title bar.

NOTE: If the Financial Information section is not visible on your Vehicle Detail page, click the Edit Layout link in the upper right corner of the page, and add the Financial Information section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

3 On the Financial Information Edit page, fill in the information.

The following table describes some field information for financial information.

Field	Comments
Financial Detail #	System-generated number. Limit of 15 characters.
Finance Provider	Limit of 30 characters.

Vehicle Fields

Use the Vehicle Edit page to add a vehicle or update details for an existing vehicle. The Vehicle Edit page shows the complete set of fields for a vehicle.

NOTE: Company administrators can customize your application in a variety of ways, such as changing names for record types, fields, and options in picklists. Therefore, the information you see might differ from the standard information described in this table.

The following table provides additional information regarding some fields.

Field	Description
Key Vehicle Information	
VIN	Vehicle identification number (VIN). Limit of 100 characters.
Make	The manufacturer or brand name of the vehicle. Default values include: Metro Motors, Toyota, and Unknown Make.
Model	Model of the vehicle. Default values are: 4Runner and Tacoma.
Year	The year that the vehicle was manufactured. This is a numerical picklist and does not accept non-numerical characters.
Product Name	The name of the product. Typically, to add products, your company administrator uses Content Management functionality. For Vehicles, the company administrator can update the product record with the Product Type field set to Vehicle. Note that the Product Type is not exposed in the product default layout. The procedure to expose Product Type for vehicles is described in Enabling a Vehicle Product Type (on page 725).
Trim	The trim for the vehicle. Default values are: 2WD and Prerunner.
Door	The number of doors for the vehicle. The default values are: 2 Door, 3 Door, and 4 Door.
Exterior Color	The color of the vehicle.
Vehicle Currency	The currency designation for the vehicle price, for example, U.S. dollars (USD).
Owner	The owner of the vehicle record. Depending on the record ownership mode that your company administrator sets up for the record type, you might see the Owner field, or the Book field, or both of these fields on the record Detail page, and one or both of the fields might be blank. For more information about record ownership modes, see About Data Access, Record Sharing, and Record Ownership (on page 47).

Field	Description
Additional Vehicle Information	
Used/New	Whether the vehicle is new or used.
Product Type	The type of vehicle. Limit of 30 characters. NOTE: This field is read-only.
Interior Color	Color of the vehicle’s interior, for example, Red.
Transmission	The vehicle’s transmission type. The default values are: Auto, Manual, and Option.
Engine	The vehicle’s engine type. The default values are: 4 Cylinder, 6 Cylinder, 8 Cylinder, 10 Cylinder, and Option.
Body	The vehicle’s body type, for example, Coupe or Cabriolet.
Owned By	The vehicle ownership type, for example, Business or Company Car.
Contact	The contact person for the vehicle. Limit of 100 characters. NOTE: This field is read-only.
Account	The account linked with the vehicle.
Account Site	The location of the account. Limit of 50 characters. NOTE: This field is read-only.
Selling Dealer	Name of the dealer selling the vehicle. Limit of 100 characters.
Servicing Dealer	Name of the dealer servicing the vehicle. Limit of 100 characters.
MSRP	The manufacturer's suggested retail price (MSRP) in the currency used in the Vehicle record. Limit of 22 characters.
Dealer Invoice Price	The dealer’s invoice price in the currency used in the Vehicle record. Limit of 22 characters.
Status	The current status of the vehicle, for example, Production.
Location	The location of the vehicle, for example, Dealer Lot.
Current Mileage	The current number of miles that appears on the vehicles odometer. Limit of 22 characters (number).
Warranty Type	The type of warranty that is provided with the vehicle, for example, Full or Extended.

Field	Description
License Number	The owner's license number. Limit of 30 characters.
License State	The state for which the license is issued.
Description	Limit of 250 characters.

Note: To configure any of the picklist fields, for example Model, Trim, Door, your company administrator can customize the application for the picklist values as described in Changing Picklist Values (on page 1254).

Custom Fields

NOTE: Company administrators, whose role includes the Customize Application privilege, typically create custom fields.

Any custom field that is created in an Asset record appears as the same custom field in the Vehicle record. A Vehicle record inherits a custom field in an Asset record. However, any custom field created in a Vehicle record does not automatically appear in the Asset record.

If you want to see the same custom field in both the Asset view and the Vehicle view, your company administrator can create the custom field in the Asset record, and make it visible to both the Asset view and the Vehicle view.

If you do not want to see the same custom field in both the Asset view and the Vehicle record, your company administrator can create the Asset specific custom field for the Asset, and make the custom field visible only in the Asset view.

For more information on custom fields, see About Custom Fields (on page 1208).

Additional Fields

Several fields do not appear on the Vehicle Detail page by default: Part #, Purchase Date, Purchase Price, Quantity, Ship Date, Install Date, Expiration Date, Notify Date, Product Category, and Contract.

Your company administrator can change the definitions of these fields as required. For more information on changing field definitions, see Creating and Editing Fields (on page 1219). To make the fields visible, your company administrator must include these fields in the page layout. For more information on making these fields visible on a page, see Customizing Static Page Layouts (on page 1267).

Related Information

See the following topics for related Vehicle information:

- Working With the Vehicle Homepage (on page 722)
- Managing Vehicles (on page 723)

13 Personalizing Your Application

You can use the My Setup pages to personalize Oracle CRM On Demand. For step-by-step instructions, click one of these topics:

Related Topics

See the following topics for related information about personalizing your application:

Updating Your Personal Details

You can update your personal details, such as your address and phone number. Your company administrator controls the layout and information that you see on your Personal Detail page, consequently there might be differences between the following descriptions and what you see.

NOTE: Changes made to your Default Language, Currency, Time Zone, and Country on the Personal Profile pages are not reflected in all reports and analyses until you sign out and sign in again.

To update your personal details

1. In the upper right corner of any page, click the My Setup global link.
2. In the Personal Profile section, click the Personal Profile link.
3. In the Personal Information section, click the My Profile link.
4. In the Personal Detail section, click Edit.
5. In the Personal Edit form, update the information, then save the record.

   Note: You must sign out and in again to activate some of the changes (Language, Locale, Time Zone, and Currency).

The following table describes some fields you can review or update.

Field	Description
Key User Information	
First Name	The first name of the user. Limit of 50 characters. This is a required field.
Last Name	The last name of the user. Limit of 50 characters. This is a required field.
Middle Name	The middle name of the user. Limit of 50 characters.
Mr./Ms.	The salutation of the user.
Status	This read-only field indicates the status of the user. Only active users can access Oracle CRM On Demand.
Reports To	This read-only field indicates the manager of the user. **NOTE:** Depending on how your company administrator sets up the user page layouts for your company, you might see the Reports To (Alias) field instead of the Reports To field. The Reports To (Alias) field shows the short identifier for the manager of the user.
Job Title	This read-only field shows the job title of the user
Region	The region or area where the user is located. Limit of 40 characters.
Subregion	A further refinement of the region or area where the user is located. Limit of 40 characters.

Field	Description
Role	This read-only field indicates the role assigned to the user in Oracle CRM On Demand. User roles define the features in Oracle CRM On Demand that a user has the privileges to use, the set of permissions the user is given to work with protected information, and the user interface settings that display information.
Primary Group	The group to which this user has been added. Read-only.
Default Book	The user book or custom book that you see by default in the Book selector at the start of your session in Oracle CRM On Demand. The default book applies to the Book selector in all areas of Oracle CRM On Demand other than the Analytics pages. The setting in the Default Book field does not limit your access to records. You can select a different book in the Book selector. You can change your default book. You can select any book to which you have visibility, that is, you can select any book of which you are a member, or any subbook of a book of which you are a member. However, to select a custom book as your default book, your user role must allow you to access the Book record type. That is, the Has Access check box must be selected for the Book record type on your user role. **NOTE:** Your administrator can specify a default book for each record type for you. If a default book is specified for a record type for you, then in the Book selector, the default book for the record type takes precedence over the default book that is specified in the Default Book field on your personal profile.
Default Book for Analytics	The user book or custom book that you see by default in the Book selector in the Analytics pages. This setting does not limit your access to data. You can select a different book in the Book selector.
Preserve Default Book	This check box applies to the Book selector in all areas of Oracle CRM On Demand except the Analytics pages. The Preserve Default Book check box works as follows: - If this check box is selected, then the Book selector shows the book that is selected in the Default Book field in your user profile each time that you open any page or window where the Book selector is available. You can select a different book in the Book selector in any page or window. However, the next time that you revisit that page or window, or you open any other page or window where the Book selector is available, you see the default book in the Book selector. Your earlier selection in the Book selector is lost. - If this check box is not selected, then the Book selector shows the book that is selected in the Default Book field in your user profile until you select a different book in the Book selector. After you select a different book in the Book selector, you continue to see the new book in the Book selector for that record type until you sign out and sign in again.

Field	Description
User Detail Information	
Alias	A short identifier for the user that is used to assign or show ownership on specific record types. For example, enter the user's preferred name or nickname. This is a required field and is set up by the company administrator.
User ID	A unique system identifier for a user used in conjunction with Company Sign In ID to sign in to the application. This is a required field, which the company administrator sets up.
Email	The complete email address for a user, such as isample@rightequip.com. The email address is used for system notifications such as a reset password notification. This is a required field, which the company administrator sets up.
Secondary Email	The secondary email address for the user.
Work Phone #	The user's work telephone number. This is a required field.
Cellular Phone #	The user's cellular phone number.
Company Sign In ID	The company to which the user belongs. This is a default field and is set up at the time the company is created.
User Sign In ID	The ID with which the user signs in to the application. The ID is a combination of the Company Sign In ID and the User ID, separated by a forward slash. The User Sign in ID is a required field and is set up by the company administrator.
Contact Preferences	
Never Call	Select this check box if you do not want to receive calls from Oracle CRM On Demand Marketing.
Never Mail	Select this check box if you do not want to receive mail from Oracle CRM On Demand Marketing.
Never Email	Select this check box if you do not want to receive email messages from Oracle CRM On Demand Marketing.
Always Send Critical Alerts	If this check box is selected, you receive email messages containing important information from Oracle CRM On Demand. These messages include: - Critical information about product updates and service changes for Oracle CRM On Demand and related products - Instructions and schedules for upgrades to major new releases

Field	Description
	■ High priority or emergency communications to supplement normal support processes (for example, in the case of a hardware failure) This field cannot be updated on your Personal Details page. Only company administrators have the ability to update this check box for users, from the User Details page. **NOTE:** This check box is not used to determine which users receive the system alerts issued by Oracle CRM On Demand Customer Care, such as reminders for upcoming scheduled maintenance.
User Geographic Information	
Language, Locale, Currency, Time Zone	Your company administrator sets up the default settings for these items. You can override the defaults by clicking the picklist for each item, and selecting the value that you want. For more information on these fields, see About Profile Settings for Users (on page 741). You must sign out and sign in again to activate any change to your language, locale, currency, or time zone.
User Security Information	
Reporting Subject Areas	Use this picklist to set your visibility to records in real-time reports in Analytics. These reports provide real-time analyses of data. You can select one of the following values: ■ **Manager Visibility.** Allows you to see your own data, plus data directly owned by your subordinates. (This is the default setting.) ■ **Team Visibility.** Allows you to see your own data, plus data shared with you by the Account and Opportunity Team. If you do not define the Reporting Subject Areas setting, then the company-wide setting that is set up by your company administrator applies. For more information on reports, see Analytics (on page 789), particularly the About Visibility to Records in Analytics (on page 807) topic.
Historical Subject Areas	Use this picklist to set your visibility to records in historical reports in Analytics. Historical reports have to do with historical or trend analysis, or contain more complex calculations than those found in real-time reports. You can select one of the following values: ■ **Manager Visibility.** Allows you to see your own data, plus data directly owned by your subordinates. (This is the default setting.) ■ **Team Visibility.** Allows you to see your own data, plus data shared with you by the Account and Opportunity Team. ■ **Full Visibility.** This setting combines Manager Visibility, Team Visibility, and books. If you do not define the Historical Subject Areas setting, then the company-wide setting that is set up by your company administrator

Field	Description
	applies. For more information on reports, see Analytics (on page 789), particularly the About Visibility to Records in Analytics (on page 807) topic.
Role-Based Can Read All Records	Use this picklist to specify whether you want Analytics to use the Can Read All Records setting on a record-type basis, as defined on the Record Type Access page within the Role management wizard. If the Role-Based Can Read All Records setting is enabled through either the company profile or your user profile, and if the Can Read All Records visibility setting is selected by your administrator for your user role on a given record type, then you can view all records of that record type in Analytics. See About the Role-Based Can Read All Records Setting (see About the Role-Based Can Read All Records Setting on page 742) for guidance on when and how to enable the Role-Based Can Read all Records setting. If the Role-Based Can Read All Records setting is not enabled, then Analytics uses the visibility set on the Reporting Subject Areas and Historical Subject Areas fields.
External Identifier for Single Sign On	Read-only. For more information, see Setting Up Your Company Profile and Global Defaults (on page 1123).
Last Sign In	A system-generated field. For information on reviewing all your sign-in attempts, see Reviewing Your Sign In Activity (on page 746).
Additional Information	
Default Theme	This picklist allows you to select the available application-wide themes for your application when you sign in to Oracle CRM On Demand using a desktop or laptop computer. A theme changes the look and feel of the application, including its background color, hyperlinks, and icons. Several predefined themes are available. However, your company administrator can create custom themes in Oracle CRM On Demand. A blank value indicates that you have to use the theme that your company administrator has set in the company profile. For more information on creating custom themes, see Creating New Themes (on page 1348).
Tablet Theme	The tablet theme is automatically used when you sign 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. If you do not select a default theme and a tablet theme in your personal profile, then the themes that are specified for your user role are used, and if no themes are specified for your user role, then the themes that are specified for your company are used. For more information on how themes work in Oracle CRM On Demand, see About the Interface (on page 28).

Field	Description
Default Search Record Type	This picklist allows you to change the default search record type to display in the Action bar search. (For example, change Contact to Account or another record type that you can access.) The action bar search box defaults to this record type every time you sign in to the application regardless of where you left it the last time you were signed into the application.
Navigate Directly to Detail Page If Only One Record Is Returned	This picklist allows you to enable or disable the feature that opens a record returned by a search directly in the record Detail page, if it is the only record returned by the search. This setting is blank by default. The following options are available: - **Enabled.** If a search returns only one record, then the record opens directly in the record Detail page. - **Disabled.** The results of a search are always shown in a List page, even if the search returns only one record. If this setting is blank in your user profile, then the setting at company level is used, and if the setting is blank at company level as well, then the feature is disabled for you. **NOTE:** This setting applies to searches that you perform in the Action bar, and to advanced searches of single record types from the Advanced link in the Action bar only. It does not apply to searches from the Advanced link in a list of related records, or to searches from the Advanced link in Lookup windows, or to searches of multiple record types.
Show Welcome Page on Sign In	This check box allows you to specify whether the Oracle CRM On Demand Welcome Page is displayed when you sign in to the application.
Record Preview Mode	This picklist allows you to enable the record preview functionality and to specify how the preview window opens. Depending on the setting you select, the preview window opens when you hover your pointer over a link to a record, or when you click on a preview icon that appears when you hover your pointer over a link to a record. The preview window shows the first section of the Detail page of the record. You also have the option of disabling the record preview functionality by selecting Off in this field. The record preview setting can be specified at company level by your company administrator, and by each user. Your personal setting overrides the setting for the company. If this field is blank, the record preview setting for the company is used.
Head-up Display	If the head-up display functionality is turned on, and if the Support Head-up Display Settings check box is selected on your theme, then links to the related information sections of the page (such as linked records sections) are available in the head-up display at the bottom of your browser window. You can click the links to go to the related information sections without having to scroll down the page. You can collapse the head-up display by clicking the minus icon (-) in the display; to expand the display again, click the plus icon (+). Your expand or collapse setting in the head-up display is

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>maintained for all record types until you change it again, even if you sign out of the application and sign in again.

You can remove the head-up display completely from your Detail pages, by turning off the functionality in your personal profile.

NOTE: If your theme supports the head-up display functionality, then the head-up display functionality can be turned on or off at company level, and by each individual user. Also, your personal setting overrides the company setting. Your administrator can remove the head-up display completely by deselecting the Support Head-up Display Settings check box on your theme. The colors in the head-up display are determined by the theme you are using. For more information about choosing a theme, see Setting Your Theme (on page 743).</td></tr>
<tr><td>Related Information Format</td><td>If your user role has the Personalize Related Information Display Format privilege, then you can choose to show the related information sections on record Detail pages as lists or as tabs. If the Related Information Format field in your personal profile is blank, then the setting for your user role is used; and if the Related Information Format field on your user role is blank, then the setting for the company is used.</td></tr>
<tr><td>User Time Zone Support for Reporting Subject Areas</td><td>If this check box is selected on your user profile, then the dates and times in real-time reports are shown according to your time zone.

Depending on how your company administrator sets up your Personal Profile page, you might be able to change this setting.

If this check box is not selected on your user profile, then the dates and times shown in reports are displayed according to the company's time zone.</td></tr>
<tr><td>Freeze List Column Header</td><td>This picklist determines how you view column headers for lists and search results in Oracle CRM On Demand. You can select the following values:
On. When you scroll down a list of records, and the column header row reaches the top of the browser window, the column labels are always visible.
Off. When you scroll down a list of records and the column header row reaches the top of the browser window, the column labels are no longer visible.

NOTE: If the Freeze List Column Header field in your personal profile is blank, then the setting for the company is used.</td></tr>
</table>

Field	Description
Customized Code Enablement	This picklist field determines whether any customized code on the pages in Oracle CRM On Demand is enabled or disabled for you. It also determines whether the customized code indicator is enabled or disabled for you. The following options are available: - **Enabled.** This is the default setting in the standard application. When this option is selected, all of the customized code that is available in the pages in Oracle CRM On Demand is enabled, but the customized code indicator is not enabled. - **Enabled with indicator.** When this option is selected, all of the customized code that is available in the pages in Oracle CRM On Demand is enabled. In addition, the customized code indicator is enabled. - **Disabled with indicator.** When this option is selected, all of the customized code that is available in the pages in Oracle CRM On Demand is disabled. In addition, the customized code indicator is enabled. **NOTE:** If you set this field to Disabled with indicator, then any reports and dashboards that are embedded in custom Web applets do not run for you. **NOTE:** Changing the value in the Customized Code Enablement field in your user profile does not affect the behavior of the customized code or the customized code indicator for any other user. For more information about customized code and the customized code indicator, see About Enabling and Disabling Customized Code and the Customized Code Indicator (on page 184).

About Profile Settings for Users

Each company has at least one designated company administrator who sets up and customizes Oracle CRM On Demand for the entire organization. Company administrators set up some defaults that every user inherits initially, but each user can override these initial default settings. The following table describes what the settings affect.

Setting Name	Description
Time Zone	The application supports Universal Time Code (UTC) so that all times and dates are shown according to the user's time zone. For example, an appointment scheduled for 11:00 a.m. PST displays as 2:00 p.m. for a user whose setting is EST, because of the three-hour time difference.
Locale	The Locale setting determines the formatting for numbers, currencies, phone numbers, times, and dates. For example, users who select the German - Germany locale setting see currency amounts that display 110.000,00, whereas users who select the English - United States setting see the same amount as 110,000.00. Users should select the format they are most comfortable with.
Language	The Language setting allows users to change the language for the user interface, online help, and tutorials. Depending on the company's default language, users may see certain items in reports in a language other than their default.

Setting Name	Description
Currency	The Currency setting provides the default currency amount linked with all new records the user creates. When a user views revenue reports, they display in the user's default currency. If a manager sees cumulative revenue from users with different currencies, she sees the amount in her default currency (company administrators must set up exchange rates for this to occur). However, forecasts are always rolled up to the company's default currency. For example, a user with U.S. dollars as his default currency sees his forecast converted to euros, if his company's currency is euros.
Country	The Country setting on the user profile controls the template that is used to display the default country-specific address fields when the user creates a new record with an address. For example, if the Country field on the user's profile is set to France, then when the user creates a record with an address, such as an account record, the French template is used to display address fields that are specific to France for both the shipping and billing addresses when the new record page first opens.Oracle CRM On Demand has address templates specific to over 60 countries.
Phone	The Phone formatting is determined by the Locale setting. The application adjusts for out-of-the-area phone numbers so that users see the entire sequence they need to dial. For example, a user in the U.S. is required to dial 011 when dialing internationally. Therefore, when a user enters +44 3333 333 333 for the United Kingdom, the number displays as 011 +44 3333 333 333. **NOTE:** Users should enter the prefix plus sign (+) before international numbers. Phone fields have a phone icon next to them. Clicking on the icon opens a phone verification window, which allows users to verify if the application has correctly identified the number: country code, city/area code, local number, and any extension for the number. Closing that window prompts the application to enter the correct dialing sequence. Additionally, if users want to determine the country code for a country, they can click the phone icon, select the country, and save the information. The country code for the country displays in the Phone field.

NOTE: When these settings are changed, the user must sign out and sign in again for Oracle CRM On Demand to display data with the new settings.

About the Role-Based Can Read All Records Setting

Your company administrator sets up the Role-Based Can Read All Records setting in the Company Profile page, but a user can override this setting in the user's User Profile page. Depending on how the Role-Based Can Read All Records setting is configured, Analytics uses the visibility set on an object basis on the user's role definition, or the visibility set on the Reporting Subject Areas and Historical Subject Areas fields on the Company Profile and User Profile pages. For more information on company and user profiles, see Configuring Analytics Visibility Settings (on page 1149) and User Fields (on page 1365).

The following table provides information on when and how to enable the Role-Based Can Read All Records setting.

Role-Based Can Read All Records Setting		Visibility of Role Record Type
Company Profile Setting	**User Profile Setting**	
Yes	Yes	Enabled
Yes	No	Disabled
Yes	NULL	Enabled (displays the company profile setting by default)
NULL	Yes	Enabled
NULL	NULL	Disabled (displays the company profile setting by default)
NULL	No	Disabled

To update your personal profile, see Updating Your Personal Details (on page 734).

To update the company profile (company administrators only), see Setting Up Your Company Profile and Global Defaults (on page 1123).

Setting Your Default Search Record Type

You can set your default search record type from your personal profile information. For example, you might want to modify your default search record type for your targeted searches from a Contact record to an Account record. For more information on using searches with Oracle CRM On Demand, see Finding Records (on page 74). To set your default search record type, complete the steps in the following procedure.

To set your default search record type

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Personal Profile section, click the Personal Profile link.
3. In the Personal Information section, click the My Profile link
4. In the Personal Detail page, click Edit.
5. In the Personal Edit page, scroll down to the Additional Information section.
6. Select the record type that you want in the Default Search Record Type picklist.
7. Save the record.

Note: You must sign out and sign in again to Oracle CRM On Demand to see the changes.

Setting Your Theme

You can set your UI Theme from your personal profile information to one of the several predefined themes in Oracle CRM On Demand or to a custom theme already created by your company administrator. For more information on creating new themes, see Creating New Themes (on page 1348). A blank theme indicates that no theme is defined for you. In this case, the company theme or role theme (if defined) is used.

To set your theme, complete the steps in the following procedure. When you specify a theme, it takes precedence over any other theme that is specified at the role or company level.

To set your theme

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Personal Profile section, click the Personal Profile link.
3. In the Personal Information section, click the My Profile link, and click Edit.
4. Scroll down to the Additional Information section.
5. Select the theme that you want in the Default Name picklist.
6. (Optional) To select the theme you want to use when using a tablet computer or other touch-screen device, click the Lookup icon (magnifying glass) in the Tablet Theme field.

   NOTE: Oracle CRM On Demand will use the theme specified in the Tablet Theme field provided that the tablet computer or touch-screen device is detected by Oracle CRM On Demand. If you do not select a default theme and a tablet theme in your personal profile, then the themes that are specified for your user role are used, and if no themes are specified for your user role, then the themes that are specified for your company are used. If a tablet theme is not specified at any level, then your default theme is used. For information about how themes work in Oracle CRM On Demand, see About the Interface (on page 28).

Setting Your Record Preview Mode

If the record preview functionality is enabled, you can preview records from record links in many places in Oracle CRM On Demand, including the following:

- My Homepage
- Record Homepages
- Record List pages
- Record Detail pages (including lists of related records)
- Action bar
- The pins that are placed on a map to indicate the locations of addresses that are returned by a proximity search. For information about performing proximity searches, see Performing Proximity Searches (on page 364).

The preview window shows the first section of the Detail page of the record. You can set your record preview mode in your Personal Details page. Depending on the setting you select, the preview window opens when you rest your pointer on a link to a record, or when you click a preview icon that appears when you rest your pointer on a link to a record. You can also disable the record preview functionality.

Your company administrator can specify the record preview mode at company level, and each user can also specify the record preview mode in their Personal Details page. Your personal setting overrides the setting for the company. If the Record Preview Mode field in your personal profile is blank, then the record preview mode for the company is used.

To set your record preview mode, complete the steps in the following procedure.

To set your record preview mode

1. In the upper-right corner of any page, click My Setup.
2. In the Personal Profile section, click Personal Profile.
3. In the Personal Information section, click My Profile.
4. In the Personal Detail page, click Edit.
5. In the Personal Edit page, scroll down to the Additional Information section.

6 In the Record Preview Mode field, select the mode that you want from the picklist.

If you want to use the record preview mode for the company, select the blank option from the picklist.

7 Save the record.

Changing Your Language Setting

The language setting in your personal details controls the language that you see in the user interface, online help, and tutorials. Your company administrator initially specifies your language, but you can change this setting in your personal details. Depending on the company's default language, you might see certain items in reports in a language other than the language you set as your default.

To change your language setting, complete the steps in the following procedure.

To change your language setting

1. In the upper-right corner of any page, click My Setup global link.
2. In the Personal Profile section, click Personal Profile.
3. In the Personal Information section, click My Profile.
4. In the Personal Detail page, click Edit.
5. In the Personal Edit page, scroll down to the User Geographic Information section.
6. Select the language that you want in the Language picklist.
7. Save the record.
8. Sign out of Oracle CRM On Demand, and sign back in again to activate the change.

Viewing Audit Trail Fields

To view the activity of software applications, such as Web services and Oracle Outlook Email Integration On Demand, complete the steps in the following procedure.

To view audit trail fields

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Personal Profile section, click the Personal Profile link.
3. In the Personal Information section, click the My Profile link.
4. Scroll down to the Audit Trail section to review the fields that are enabled for audit.

Managing Your Quota

Either you or your company administrator can set up your quotas. As an end user, you do not require any special privilege, however your company administrator requires the Manage Users privilege to set up your quota.

You can review and modify existing quotas or enter new quotas and calculate them by:

- Entering a yearly quota, which the system spreads evenly over the year
- Entering a quota for each month, which the system totals for the year

When selecting the year for a quota to start, you can select the current calendar year, or one of the preceding three years, or one of the upcoming three years. You can make a quota active at any time. After you activate a quota, Oracle CRM On Demand uses the quota information to populate fields in the Forecasting pages. It saves your targets for each year, allowing you to review your target history, and compare your forecasts with your quotas. For additional information, see Managing Quotas (on page 335).

NOTE: You can have more than one active quota per year. Since only active quotas are used when creating your forecast, make sure that you activate all of the quotas that you want included in your forecast.

To define your quota

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Personal Profile section, click the Personal Profile link.
3. In the Personal Information section, click the My Profile link.
4. In the Personal Detail page, scroll to the Quotas section.
5. In the Quotas section, click New Quota.
6. In the Edit Quota form, enter the Quota Begins and Name for the quota.
7. Do one of the following:
   - To spread a yearly quota evenly over the fiscal year, enter the amount in the Total Quota field and click Spread.
   - To add the monthly quotas together, enter an amount for each month and click Sum.

     NOTE: Clicking Sum adds all monthly quota entries and displays the total in the Total field.
8. Save the record.

Reviewing Your Sign In Activity

You can review your sign in activity, for example, the number of times you signed into the application.

NOTE: Every night, Oracle CRM On Demand permanently deletes user sign-in records that are more than 90 days old.

To review sign in activity

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Personal Profile section, click the Personal Profile link.
3. In the Personal Information section, click the My Profile link.
4. In the Personal Detail page, scroll down to the Sign In History section to review your sign-in activity.

   This activity includes your sign-in activity from other applications, including Oracle CRM On Demand Integration for Office, Oracle Outlook Email Integration On Demand, and so on.

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

Changing Your Password

Oracle CRM On Demand allows you to change your password at any time, provided that your role includes the Reset Personal Password privilege.

Note: If your company has implemented a solution where you must use Single Sign-On (SSO) to access Oracle CRM On Demand, you must reset your password using that solution, and not in Oracle CRM On Demand.

To change your password

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

2 In the Personal Profile section, click the Personal Profile link.
3 In the Personal Information section, click the Password Update link.
4 In the Password Update page, review the password policy before making any changes to your password.

   Typically, the password policy is set by the company administrator and is subject to change.
5 In the Password Update section, fill in the fields.
6 Save the record.

Setting Up Your Security Questions

If you forget your password for Oracle CRM On Demand, your security questions are used. You set up your security questions when you sign in to Oracle CRM On Demand for the first time. However, you can change your security questions and answers at any time.

What Happens If You Forget Your Password?

If you forget your password for Oracle CRM On Demand, you can click the Can't Access Your Account? link on the Oracle CRM On Demand Sign-In page, and then click the I Forgot My Password link to reset your password. Oracle CRM On Demand then sends an email to you that contains a temporary link to the application. When you access the temporary link, you are required to answer your security questions for authentication. When you answer the questions correctly, then you can set up your password in Oracle CRM On Demand. For more information about resetting your password if you forget it, see Retrieving Your User Sign-In ID or Resetting Your Password (on page 185).

NOTE: If you forget your user sign-in ID, you can also use the Can't Access Your Account? link on the Oracle CRM On Demand Sign-In page to submit a request to have your user sign-in ID sent to you by email.

The following procedure describes how to set up your security questions.

To set up your security questions

1 In the upper-right corner of any page, click the My Setup global link.
2 In the Personal Profile section, click the Personal Profile link.
3 On the Personal Profile page, click the My Security Questions link.
4 On the My Security Questions page, if you are not setting up your security questions for the first time, enter your password for Oracle CRM On Demand in the Current Password field.
5 Select the questions, and enter the answers.

   NOTE: An answer cannot exceed 100 characters.
6 Save the record.

TIP: Take note of the security questions and answers that you set up, so that you have the information readily available if you forget your password.

Reviewing Your Delegate Information

User delegation is a feature that allows a user who supports multiple people to see all of the records belonging to those people. If your company administrator has enabled the user delegation feature and your user role has been set up for user delegation, then you can do the following:

- View a list of the users for whom you are a delegate.
- View a list of the users who are delegates for you.
- Add delegates for yourself.

  For more information about adding delegated users, see Adding Delegated Users (on page 748).

To view a list of the users for whom you are a delegate, complete the steps in the following procedure.

To view a list of the users for whom you are a delegate

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Personal Profile section, click the Personal Profile link.
3. In the Personal Information section, click the My Profile link.
4. On the Personal Detail page, scroll down to the Delegated From Users section to see a list of the users for whom you are a delegate.

To view a list of the users who are delegates for you, complete the steps in the following procedure.

To view a list of the users who are delegates for you

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Personal Profile section, click the Personal Profile link.
3. In the Personal Information section, click the My Profile link.
4. On the Personal Detail page, scroll down to the Delegated To Users section to see a list of the users who are delegates for you.

NOTE: If the Delegated From Users section or the Delegated To Users section is not visible on your Personal Detail page, click Edit Layout in the upper-right corner of the page, and add the section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.

Related Topics

About User Delegation (on page 1381)

Adding Delegated Users

User delegation allows a user who supports multiple people to see all of the records belonging to those people. If your company administrator has enabled the user delegation feature and your user role has been set up for user delegation, then you can allow a user to act as a delegate for you by adding that user to your list of delegated users. Your delegated users gain owner access to the records owned by you.

Your company administrator can also appoint delegates for you. For more information on how company administrators appoint delegated users, see Managing Delegated Users (Administrator) (on page 1382).

To add delegated users

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Personal Profile section, click the Personal Profile link.
3. In the Personal Information section, click the My Profile link.
4. Scroll down to the Delegated To Users section, and click Add Users.

   NOTE: If the Delegated To Users section is not visible on your Personal Detail page, click Edit Layout in the upper-right corner of the page, and add the Delegated To Users section to your page layout. If the section is not available to add to your page layout, then contact your company administrator.

5. In the Delegated Users Edit page, click the Lookup icon to select the users that you want to add to the Delegated Users list.
6. If values are defined in the Delegated User Roles field, then you can optionally select a delegated user role for each user.
7. Click Save.

Related Topics

About User Delegation (on page 1381)

Granting Sign In Access to Technical Support

You can grant permission to a technical support representative to access your Oracle CRM On Demand session. This access might be necessary to allow the technical support representative to troubleshoot a problem.

To grant sign in access to others

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Personal Profile section, click the Personal Profile link.
3. In the Personal Information section, click the Sign In Access link.
4. On the Sign In Access page, enter a date and time range for the period of time you are allowing that person to have access to your session.
5. Save the record.

Note: If you want to terminate sign in access prior to the Access End Date that you specified, and you have already granted access using this feature, enter a new date and time range with dates that are in the past.

Displaying Your Tabs

The tabs across the top of your pages provide the starting point for managing your data. The role your company administrator assigns to you determines what tabs are available to you and the order in which they initially appear.

NOTE: You can personalize your tabs only if the Personalize Tabs privilege is enabled for your role. For more information, contact your company administrator.

The following procedure describes how to change the order in which your tabs appear.

To change your tab order

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Layout Personalization section, click the Personal Layout link.
3. In the Personal Tab Layout section, click the Tab Layout link.
4. In the Available Tabs section, select the tab you want to add, and then click the right arrow button to move it from the Available Tabs section to the Selected Tabs section.

   NOTE: You can select more than one tab at a time by holding down the SHIFT or CTRL key when you click to select the tabs.
5. In the Selected Tabs section, select one tab at a time and use the arrows to move the tab up or down until it appears in the order you want.

   NOTE: (Optional) To revert your tab layout to the default settings for your role, click Default.
6. Click OK and save the record.

Changing Your Detail Page Layout

Users can personalize the layout of the related information sections on the Detail page for a record type if the Personalize Detail Page - Related Information privilege is enabled for their user role. For step-by-step instructions for personalizing related information layouts, see Personalizing Related Information Layouts (on page 751).

Users can personalize the field layout on the Detail page for a record type when their user role is set up as follows:

- The Personalize Detail Page - Fields privilege is enabled for the role.
- A custom page layout is assigned to the role for the record type.

The personalized field layout that a user creates for the Detail page for a record type is also used for the pages where the user edits records of that record type. Depending on how the user's role is set up, the user's personalized field layout might also be used in the pages where the user enters information for a new record. For step-by-step instructions for personalizing field layouts, see Personalizing Field Layouts (on page 754).

About Accessing the Personal Layout Pages

If your user role allows you to personalize your Detail page layouts, then you can access the Personal Layout pages for a record type through the Edit Layout link in the Detail page of a record of that record type. You can also access the Personal Layout pages for the record-type Detail pages through the global My Setup link. Depending on the privileges that are enabled for your user role, the behavior is as follows when you access the Personal Layout pages to personalize a Detail page layout:

- The Personal Layout page opens if your user role includes any two of the following privileges: Personalize Detail Page - Fields privilege, Personalize Detail Page - Related Information privilege, or Personal Detail Page - Records Indicator privilege.

  On the Personal Layout page, there are three links, as follows:

  - **Field Layout.** This link opens the Personal Layout - Fields page, where you can personalize the field layout for the record type.

    NOTE: The Field Layout link is available on the Personal Layout page only if a custom page layout is assigned to your user role for the record type. If the Standard page layout for the record type is assigned to your user role, then the Field Layout link is not available.

  - **Related Information Layout.** This link opens the Personal Layout - Related Information page, where you can personalize the layout of the related information sections on the Detail page for the record type.
  - **Manage Record Indicator.** This link opens the Personal Layout – Record Indicator page, where you can set up the related information sections so that indicators are displayed to show whether any records are present in the sections.
- The Personal Layout - Fields page opens directly if your user role includes the Personalize Detail Page - Fields privilege but does not include the Personalize Detail Page – Related Information privilege or the Personal Detail Page - Records Indicator privilege.
- The Personal Layout - Related Information page opens directly if your user role includes the Personalize Detail Page - Related Information privilege but does not include the Personalize Detail Page - Fields privilege or the Personal Detail Page - Records Indicator privilege.
- The Personal Layout - Records Indicator page opens directly if your user role includes the Personal Detail Page - Records Indicator privilege but does not include the Personalize Detail Page - Fields privilege or the Personal Detail Page - Related Information privilege.

Related Topics

For more information about personalizing page layouts, see the following topics:

- Personalizing Related Information Layouts (on page 751)
- Managing Record Indicators for Related Information Sections (on page 757)
- Personalizing Field Layouts (on page 754)
- About the Layouts of New Record Pages (on page 50)

Personalizing Related Information Layouts

If your user role has the Personalize Detail Page - Related Information privilege, then you can create a personalized layout of the related information sections on the Detail page for a record type. The related information sections show the different record types that can be linked to the selected record. For example, notes and activities are related information that can be linked to opportunities or contacts. Your company administrator determines the type and order of the related information sections that appear on each Detail page by default. You can change the order of the related information sections or hide any related information sections that you are not using. Changing these settings affects only your view of the application.

NOTE: If your company administrator removes the Personalize Detail Page - Related Information privilege from your user role, then you cannot personalize the layout of the related information sections on your Detail pages.

About Static and Dynamic Detail Page Layouts

Detail page layouts can be static or dynamic. When static page layouts are used, you see the same page layout for all records of a given record type. Dynamic page layouts allow your company administrator to specify different page layouts for different records of the same record type, depending on the value that is selected in a specific picklist field on the record. You can personalize both static and dynamic page layouts.

About Changes to Default Page Layouts After Personalized Related Information Layouts Are Created

Your company administrator can update a static page layout or any of the page layouts used in a dynamic layout at any time. After you create a personalized layout of the related information sections for a Detail page for a record type, any changes that the company administrator makes to the availability of related information sections on the default page layout are not immediately reflected in your personalized layout.

What Happens If Related Information Sections Are Added to the Default Page Layout?

Your company administrator might add new related information sections to a default page layout for a record type for your user role after you create a personalized layout for the record type. If that happens, and if you want to add any of the new sections to your personalized layout for that page, then you must first reset your page layout to the default layout. You can then use the default page layout or create a new personalized layout that includes the new sections.

What Happens If Related Information Sections Are Removed from the Default Page Layout?

Your company administrator might remove related information sections from the default page layout for a record type for your user role. If any of the sections that the company administrator removes from the default page layout are included in your personalized layout for that page, then those sections continue to be available in your personalized layout until you remove them from your layout or you reset your layout to the default layout.

Personalizing Related Information Layouts for Static Page Layouts

The following procedure describes how to personalize the layout of the related information sections for a static layout by accessing the Personal Layout page through the My Setup global link. You can also personalize the layout of the related information sections for a static page layout by clicking the Edit Layout link on a record Detail page. For static layouts, the behavior is the same regardless of how you access the page.

To personalize the layout of the related information sections for a static Detail page layout

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Layout Personalization section, click the Personal Layout link.
3. In the Personal Detail Page Layout section, click the Layout page link whose detail page layout you want to change.
4. If the Personal Layout page opens, then click Related Information Layout.

5 In the Personal Layout - Related Information page, in the Available Related Information section, select the related information section that you want to appear, and click the arrow to move it to the Displayed Related Information section.

   TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key.

6 In the Displayed Related Information section, select one section at a time and use the arrows to move the related information section up or down until it appears in the order you want.

7 Save the record.

After you personalize the layout of the related information sections, your new layout is used in the Detail page for all records of that record type until one of the following actions occurs:

- You change the layout again.
- You restore the layout of the related information sections to the default layout.

  NOTE: Restoring a field layout to the default layout does not affect any personalized layouts of related information sections. Similarly, restoring a personalized layout of related information sections to the default layout does not affect any personalized field layouts for the record type.

- Your administrator resets the page layout for your role to the default layout.

  NOTE: If an administrator resets the page layout for a record type to the default layout for a role, then all of the personalized field layouts and all of the personalized layouts of the related information sections for that record type are restored to the default for users who have that role. However, if an administrator assigns a new page layout for a record type to a role, then all users who have that role see the new field layout for the record type, but the users continue to see their personalized layouts of the related information sections for the record type until they restore their related information layouts to the default layout.

Personalizing Related Information Layouts for Dynamic Page Layouts

When dynamic layouts are used, you might be able to create a personalized layout of the related information sections for each value in the picklist field that determines the dynamic rendering of the page layout. The functionality that allows you to create multiple personalized layouts of the related information sections for a record type is controlled by the Enable Personalization of Individual Dynamic Page Layouts check box on the company profile, as follows:

- If the Enable Personalization of Individual Dynamic Page Layouts check box is deselected, then you can create only one personalized layout of the related information sections for a record type. After you personalize the layout for a record type, you see the same set of related information sections on the Detail page for all records of that type regardless of the value that is selected in the picklist field that determines the dynamic rendering of the page layout.
- If the Enable Personalization of Individual Dynamic Page Layouts check box on the company profile is selected, then you can create a personalized layout of the related information sections for each of the values in the picklist field that determines the dynamic rendering of the page layout.

The following procedure describes how to personalize the layout of the related information sections for dynamic Detail pages when the personalization of individual dynamic page layouts is not enabled. This procedure describes how to personalize a dynamic layout by accessing the Personal Layout page through the My Setup global link. You can also personalize a dynamic layout by clicking the Edit Layout link on a record Detail page. If the personalization of individual dynamic layouts is not enabled, then the behavior is the same regardless of how you access the page.

To personalize a dynamic layout when the personalization of individual dynamic layouts is not enabled

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

2 In the Layout Personalization section, click the Personal Layout link.

3 In the Personal Detail Page Layout section, click the Layout page link whose detail page layout you want to change.
4 If the Personal Layout page opens, then click Related Information Layout.
5 In the Personal Layout - Related Information page, in the Available Related Information section, select the related information section that you want to appear, and click the arrow to move it to the Displayed Related Information section.

TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key.

6 In the Displayed Related Information section, select one section at a time and use the arrows to move the related information section up or down until it appears in the order you want.
7 Save the record.

After you personalize the layout of the related information sections, your new layout is used in the Detail page for all records of that record type regardless of the value in the picklist field that determines the dynamic layout of the page, until you change the layout again or until you restore the default layout for the Detail page, whichever comes first.

The following procedure describes how to personalize the layout of dynamic Detail pages when the personalization of individual dynamic page layouts is enabled. This procedure describes how to personalize a dynamic layout by accessing the Personal Layout page through the My Setup global link. You can also personalize a dynamic layout by clicking the Edit Layout link on a record Detail page. When the personalization of individual dynamic layouts is enabled, the behavior for dynamic layouts is as follows:

- If you access the Personal Layout page through the My Setup link, then you can create personalized layouts for all values in the picklist that determines the dynamic layout of the page.
- If you access the Personal Layout page through the Edit Layout link on a Detail page, then you can create a personalized layout only for the value that is currently selected in the picklist that determines the dynamic layout of the page.

To personalize a dynamic layout when the personalization of individual dynamic layouts is enabled

1 In the upper-right corner of any page, click the My Setup global link.
2 In the Layout Personalization section, click the Personal Layout link.
3 In the Personal Detail Page Layout section, click the Layout page link whose detail page layout you want to change.
4 If the Personal Layout page opens, then click Related Information Layout.
5 In the Personal Layout - Related Information page, in the Driving Picklist Available Values section, select the value for which you want to create a personalized layout.

NOTE: If you want to create a personalized layout that is to be used when no value is selected in the picklist field, then select the blank value in the picklist field.

6 In the Available Related Information section, select the related information section that you want to appear and use the directional arrow to move it to the Displayed Related Information section.

TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key.

7 In the Displayed Related Information section, select one section at a time, and click the arrows to move the related information section up or down until it appears in the order that you want.
8 Repeat steps 5 through 7 to create any additional personalized layouts that you want.

NOTE: If you do not create a personalized layout for a picklist value, then the default page layout for that picklist value is used.

9 Save the record.

After you personalize the layout of the related information sections for a picklist value, your personalized layout is used in the Detail page for all records in which that picklist value is selected until you change the layout for the picklist value again or until you restore the default layout for the Detail page, whichever comes first.

Restoring Related Information Layouts to the Default Layouts

The following procedure describes how to restore a related information layout to the default layout by accessing the Personal Layout page through the My Setup global link. You can also restore a related information layout to the default layout by clicking the Edit Layout link on a record Detail page. If the personalization of individual dynamic layouts is enabled, then the behavior for dynamic layouts is as follows:

- If you access the Personal Layout page through the global My Setup link, then you can restore the default related information layouts for all of the values in the picklist field that determines the dynamic layout of the page. You can also restore the default related information layouts for some picklist values while keeping your personalized layouts for other picklist values.
- If you access the Personal Layout page through the Edit Layout link on a record Detail page, then you can restore only the default related information layout for the picklist value that is currently selected in the picklist field that determines the dynamic layout of the page. You cannot restore the default related information layouts for the other picklist values.

To restore a related information layout to the default layout

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Layout Personalization section, click the Personal Layout link.
3. In the Personal Detail Page Layout section, click the Layout page link whose detail page layout you want to change.
4. If the Personal Layout page opens, then click Related Information Layout.
5. In the Personal Layout - Related Information page, do one of the following:
   - Click Default to restore the layout for a selected value in the Driving Picklist Available Values column to the default layout.
   - Click Default All to restore the layouts for all of the values in the Driving Picklist Available Values column to the default layouts.

   NOTE: The Default All button is available only for some personal detail page layouts.

For information about how personalized page layouts interact with page layouts for roles, see How Personalized Related Information Layouts Interact with Page Layouts for Roles (on page 1318).

Related Information Format on Record Detail Pages

If your user role has the Personalize Related Information Display Format privilege, then you can also choose to show the related information sections on record Detail pages as lists or as tabs, by setting the Related Information Format option in your personal profile. If the Related Information Format field in your personal profile is blank, then the setting for your user role is used; and if the Related Information Format field on your user role is blank, then the setting for the company is used. For information about changing the Related Information Format option in your personal profile, see Updating Your Personal Details (on page 734).

Personalizing Field Layouts

Users can personalize the field layout on the Detail page for a record type when their user role is set up as follows:

- The Personalize Detail Page - Fields privilege is enabled for the role.
- A custom page layout is assigned to the role for the record type.

You can personalize the field layouts for both static and dynamic layouts. When personalizing field layouts, note the following points:

- All of the fields that are available on the custom layout that is assigned to your user role for a record type appear by default on your layout until you personalize the layout.
- You can remove (hide) some of the fields on your personalized layout, but you cannot add any fields that do not appear on the default layout to your personalized layout.
- You cannot remove required fields from your layout. In addition, administrators can specify that certain fields must always appear on a layout, so that you cannot remove those fields from your personalized layout. In the Personal Layout - Fields page, the fields that must always appear on the layout are shown in the same font color as the required fields.

Depending on the type of page layout that is used, you might be able to personalize a field layout through the My Setup global link, or through the Edit Layout link on record Detail pages, or through both of these links. The following table shows which of the links you can use to personalize the field layouts. In all cases, the page layout assigned to your user role must be a custom page layout, that is, you cannot personalize the standard page layout for a record type in Oracle CRM On Demand. The information in this table also applies when you want to restore a personalized field layout to the default field layout. For information about restoring a field layout to the default field layout, see the Restoring Field Layouts to the Default Layouts section of this topic.

Layout Type	My Setup Link	Edit Layout Link
Static layout.	Yes	Yes
Default layout for a dynamic layout. For information, see the note after this table.	Yes	Yes. The driving picklist field for the dynamic layout must be blank on the record Detail page.
Layout for a specific value in the driving picklist.	No	Yes. The appropriate value must be selected in the driving picklist field for the dynamic layout.

NOTE: The default layout for a dynamic layout is the layout that is used when the driving picklist field for the dynamic layout is blank on a record.

To personalize a field layout for a record type, complete the steps in the following procedure.

To personalize a field layout for a record type

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

   NOTE: If you want to personalize the field layout that is used for a specific value in the driving picklist field for a dynamic layout, then instead of clicking the My Setup link, open a record that has the appropriate value in the driving picklist field, click Edit Layout, and then skip to step 4.

2. In the Layout Personalization section, click Personal Layout.
3. In the Personal Detail Page Layout section, click the Layout page link for the page you want to personalize.

   For example, if you want to personalize the field layout for the Account record type, then click Account Layout.
4. If the Personal Layout page opens, then click Field Layout.
5. In the Personal Layout - Fields page, use the arrows to reorganize the fields on the layout.

   You can move fields within a section of the page, and you can move fields from one section of the page to a different section. If you do not want a certain field to appear on your personalized page layout, then move the field to the Available Fields section.

NOTE: If you move a required field or a field that your administrator has specified that it must always appear on the layout to the Available Fields section, then an error message appears when you try to save the layout, and you must move the field back to any one of the sections on the layout.

6 Save your changes.

After a user creates a personalized field layout, that layout is used each time that the user opens or edits a record of that record type until one of the following actions occurs:

- The user changes the field layout again.
- The user restores the default field layout for the page.

  NOTE: Restoring a field layout to the default layout does not affect any personalized layouts of related information sections. Similarly, restoring a personalized layout of related information sections to the default layout does not affect any personalized field layouts for the record type.

- The administrator resets the page layout for the user's role to the default layout, or assigns a different layout to the role for that record type.

  NOTE: If an administrator resets the page layout for a record type to the default layout for a role, then all of the personalized field layouts and all of the personalized layouts of the related information sections for that record type are restored to the default for users who have that role. However, if an administrator assigns a new page layout for a record type to a role, then all users who have that role see the new field layout for the record type, but the users continue to see their personalized layouts of the related information sections for the record type until they restore their related information layouts to the default layout.

Depending on how the user's role is set up, the user's personalized field layout might also be used in the page where the user enters information for a new record. For more information about the field layout on new record pages, see About the Layouts of New Record Pages (on page 50).

Restoring Field Layouts to the Default Layouts

If you want to stop using a personalized field layout, then you can restore the field layout to the default layout for the record type for your role. Depending on the type of page layout that is used, you might be able to restore a field layout through the My Setup global link, or through the Edit Layout link on record Detail pages, or through both of these links. For information about which link to use, see the table in the preceding section of this topic.

To restore a personalized field layout to the default layout, complete the steps in the following procedure.

To restore a field layout to the default layout

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

NOTE: If you want to restore the field layout that is used for a specific value in the driving picklist field for a dynamic layout to the default field layout for that value, then instead of clicking the My Setup link, open a record that has the appropriate value in the driving picklist field, click Edit Layout, and then skip to step 4.

2 In the Layout Personalization section, click Personal Layout.

3 In the Personal Detail Page Layout section, click the Layout page link for the page that you want to restore to the default.

4 If the Personal Layout page opens, then click Field Layout.

5 In the Personal Layout - Fields page, click Default.

6 Save your changes.

The next time you open, edit, or create a record of that record type, you see the default layout assigned to your role for the record type.

Related Topics

See the following topic for related information about personalized field layouts:

- How Personalized Field Layouts Interact with Page Layouts for Roles (on page 1322)

Managing Record Indicators for Related Information Sections

If your user role has the Personalize Detail Page - Records Indicator privilege, then you can set up record indicators for the related information sections on record Detail pages. The record indicators allow you to see whether any records are present in a related information section, without opening the section. Your administrator can also configure the record indicators for the Detail pages for the record types at role level. If you do not personalize the record indicator settings for a record type, then the settings that are configured for the record type for your role are used. For information about the behavior of the record indicators, see About the Record Indicators for Related Information Sections (on page 71).

NOTE: The related indicator functionality is not supported for the Attachments related information section on any record type, or for the User List related information section on the Division record type. In addition, the functionality is not supported for custom Web applets.

To personalize the record indicator settings for a record type, complete the steps in the following procedure.

To personalize the record indicator settings for a record type

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Layout Personalization section, click the Personal Layout link.
3. In the Personal Detail Page Layout section, click the *record type* Layout page link.
4. If the Personal Layout page opens, then click the Manage Record Indicator link.

   NOTE: You can also access the Personal Layout - Record Indicator page by clicking the Edit Layout link on any record detail page.

5. In the Personal Layout - Record Indicator page, in the Available Related Information list, select the related information sections for which you want a record indicator to appear, and click the arrow to move them to the Selected Related Information list.

   TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key.

6. Save your changes.

After you personalize the record indicator settings for a record type, your personalized settings apply to the Detail page for all records of that record type until one of the following actions occurs:

- You update the record indicator settings on your related information sections again.
- You restore the record indicator settings for the record type to the default settings for that record type for your role. Any updates originally performed by your administrator at role level are implemented.
- Your administrator resets the page layout for your role to the default layout. All of the personalized settings for displaying record indicators for related information sections for that record type are restored to the settings configured for the record type at role level.

To restore the record indicator settings for a record type to the default settings for the record type for your role, complete the steps in the following procedure.

To restore the record indicators settings for a record type to the default settings

- In the Personal Layout - Record Indicator page, click Default.

Changing Your Homepage Layouts

If your user role includes the Personalize Homepages privilege, you can add and remove sections from your Homepage layouts (My Homepage, Account Homepage, Contact Homepage, Lead Homepage, Opportunity Homepage, and Service Request Homepage). Your company administrator configures the Homepage layouts that you see by default.

NOTE: You can also personalize Homepages by clicking the Edit Layout link on each Homepage.

To change your Homepage Layout

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Layout Personalization section, click Personal Layout.
3. In the Personal Layout page, in the Personal Homepage Layout section, click the Homepage Layout that you want to modify (for example My Homepage Layout).
4. In the Available Sections section of the page, select the section that you want to display on your Homepage and use the arrows to move the section to the Left Side section or the Right Side section.

   TIP: You can select more than one section at a time by holding down the SHIFT or CTRL key when you click to select the sections.
5. In the Left Side or Right Side section, select one section at a time and use the arrows to move the section up or down until it appears in the order you want on the Homepage.
6. Save the record.

Changing Your Action Bar Layout

Your company administrator assigns an action bar layout to each user role. Your company administrator can also make the Action bar unavailable to your user role.

If the Action bar is available to your user role, then it appears on the left side of all Oracle CRM On Demand pages by default. You can hide and show the Action bar as required. For more information, see About Showing or Hiding the Action Bar (on page 39).

If the Personalize Action Bar privilege is enabled for your role, then you can display or hide any of the Action bar sections, including Web applets, that your company administrator has made available in the Action bar layout for your user role. For more information about your user-role settings, contact your company administrator.

To change your Action bar layout

1. In the upper-right corner of any page, click the My Setup global link.
2. In the Layout Personalization section, click Personal Layout.
3. In the Personal Layout page, in the Personal Action Bar Layout section, click Action Bar Layout.
4. In the Personal Layout page, use the arrows to move the sections as follows:
   - Move the sections you want to appear in the Action bar from the Available Sections section to the Displayed Sections section
   - Move the sections you do not want to appear in the Action bar from the Displayed Sections section to the Available Sections section.

   NOTE: For the Action bar to show in Oracle CRM On Demand, there must be at least one section in the Displayed Sections section of the page.
5. Scroll to the Customize Favorites section and select the appropriate option to have new favorites added to the start or the end of a favorites list (Favorite Records and Favorite Lists), depending on your preference.

For more information on Favorite Records, see Favorite Records Page (on page 125). For more information on Favorite Lists, see Favorite Lists Page (on page 143).

6 Save your changes.

Setting Up Your Calendar

This topic describes how to set up your calendar through the My Setup global link.

When setting up your default calendar view, you can do the following:

- Select the calendar view that you want to display each time that you click the Calendar tab.
- Select the activity list that is to be displayed in the daily and weekly views of your own calendar and the individual calendars of other users who share their calendar with you (the daily and weekly user calendar views).

  In the standard application, the Open Tasks list is displayed, but you can select a different list in the Activity List on User Calendar View field in your calendar settings. Your administrator can also select a list for your user role. If you leave the Activity List on User Calendar View field blank, then the setting for your role is used, and if the Activity List on User Calendar View field on your user role is blank, then the Open Tasks list is displayed.

  All of the lists that are available to you, including private lists, public lists, system lists, and lists that are specific to your user role for the activity record type, are available for selection. In the daily and weekly user calendar views, only three of the columns from the list are shown, as follows:

  - The Subject column is always shown, provided that the Subject field is selected as a display field in the list definition.
  - The first two columns in the list, other than the Subject column, are shown.

  If the list that you select is later deleted or becomes unavailable to you, then the list that is displayed in the daily and weekly user calendar views is determined as follows:

  - If a list is selected in the Activity List on User Calendar View field on your user role, then that list is displayed.
  - If the Activity List on User Calendar View field on your user role is blank, then the Open Tasks list is displayed.
- Specify which day is shown as the first day of the week in your calendar and in the date selectors where you select values for date fields in Oracle CRM On Demand.
- Select the days of the week and the business hours that you want to show in your calendar, if you do not want to use the company-wide settings.

  By default, all of the check boxes for the days of the week are deselected, and the Business Hours Start Time and Business Hours End Time fields are blank. When specifying business hours, you can enter only one start time and one end time. You cannot specify different business hours for individual work days. If you enter a start time for your business hours, then you must also enter an end time, and the end time must be later than the start time. Similarly, if you enter an end time, then you must also enter a start time. If necessary, Oracle CRM On Demand converts the start time and end time that you enter to the appropriate format for your locale after you save your changes.

  In the daily and weekly views of your own calendar and the individual calendars of other users who share their calendar with you, the start and end times for business hours can be shown on the hour if you use a classic theme, and on the hour or half-hour if you use a modern calendar. In the group calendar and custom calendar views, the start and end times for business hours can be shown on the hour. Oracle CRM On Demand rounds the start time for the business hours down to the nearest hour or half-hour as appropriate, and rounds the end time for the business hours up to the nearest hour or half-hour. For example, if you enter 08:40 A.M. as your start time, then Oracle CRM On Demand rounds the start time down to 08:00 A.M. for the daily and weekly views of individual calendars if you use a classic theme, and rounds it down to 08:30 A.M. if you use a modern theme. If you enter 5:40 P.M. as your end time, then Oracle CRM On Demand rounds the end time up to 06:00 P.M. for the daily and weekly views of individual calendars in either a classic theme or a modern theme.

For more information about how the work days and business hours are shown in your calendar views, see About Calendar Work Days and Business Hours (on page 193).

- Select additional information to display in the appointments in your calendar views. By default, the information from the Subject, Location, and Contact Name fields in the appointment is shown in the appointments in the calendar views. You can choose to display the following additional information:
  - The name of the account that is linked to the appointment. The account name is a link to the account record.
  - The status of the appointment.
  - The phone number of the primary contact that is linked to the appointment. The phone number is a link to the contact record. If the Work Phone field is populated on the contact record, then the work phone number is shown. If the Work Phone field is not populated on the contact record, and if the Cellular Phone field is populated, then the cellular phone number is shown.
- Specify whether you want to receive reminders for activities that you own or on which you are included in the list of users, if reminders are configured on the activities. The options in the Activity Notification field are as follows:
  - **None.** If you select this option, then you do not receive any reminders.
  - **Email.** If you select this option, then you receive the email reminders.
  - **Pop-up Reminder.** If you select this option, then the reminders are displayed in the Activity Reminder pop-up window when you are signed in to Oracle CRM On Demand.
  - **Email and Pop-up Reminder.** If you select this option, then you receive the email reminders and the reminders are also displayed in the Activity Reminder pop-up window when you are signed in to Oracle CRM On Demand.
  - **Blank.** If you leave the Activity Notification field blank, then the option that is selected in the Activity Notification field at company level applies to you. The default option at company level is None, but your administrator can select a different option.

To set up your calendar, complete the steps in the following procedure. For more information on calendars, see Calendar and Activities (on page 189).

Before you begin. To share your calendar with another user or to set up custom group calendar views, your user role must include the Share Calendar privilege.

To set up your calendar

1. In the upper right corner of any page, click the My Setup global link.
2. In the Calendar Setup section, click Calendar Settings.
3. To set up your default calendar view, do the following:
   a. Click Default Calendar View.
   b. Select a calendar view.
   c. (Optional) Select the activity list that is to be displayed in the daily and weekly user calendar views.
   d. Select the day that is to be shown as the first day of the week in your calendar.

      By default, the Calendar Week Starts On field is blank. If you leave this field blank, then the company-wide setting for the first day of the week is used.

      NOTE: After you change the start day of the week, you must sign out of Oracle CRM On Demand and then sign in again to see the change in your calendar and in the date selectors where you select values for date fields in Oracle CRM On Demand.

   e. In the Calendar Work Week section, set up the work days and the business hours for your calendar, as follows:

- Select the check box for each day that you want to show as a work day in your calendar. If you select the check box for one or more days, then only those days are shown as work days in your daily and weekly user calendar views, regardless of the work days that are specified at company level. If the check boxes for all days are deselected, then the work days that are specified at company level apply to your calendar.
- If you want to specify a start time for your business hours that is different from the time specified at company level, then enter the start time in the Business Hours Start Time field.
- If you specified a start time for your business hours, then enter the end time in the Business Hours End Time field. The end time must be later than the start time.

NOTE: If you do not enter a start time and an end time for the business hours, then the business hours that are specified at company level apply to your calendar.

f In the Appointment Information Preferences section, select the check boxes for the additional information that you want to display in the appointments in your calendar views.

g In the Activity Notification field, select the option that you want, or leave the field blank if you want the setting at company level to apply to you.

h Save your changes.

4 To share your calendar with another user:

a Click Share Calendar.

b In My Calendar Share List, click Add Users.

c In the Grant New Users window, use the Lookup icon to add users with whom you want to share your calendar.

5 To set up custom group calendar views:

a Click Manage Group Views.

b In My Custom Views, click Add.

c Complete the fields in the Manage View window, and then save the record.

Setting up custom group calendar views allows you to manage your view to other users availability. When you create a new appointment, go to the Group Calendar tab and select the Calendar group you or your company administrator created to view availability.

Accessing the Data and Integration Tools

On your Personal Homepage, you can find links to tools that allow you to import data and to integrate data in Oracle CRM On Demand with other applications.

NOTE: Your company administrator sets up and enables access to the available clients. The clients include: Oracle Outlook Email Integration On Demand and Oracle CRM On Demand Desktop.

To access the data and integration tools

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

2 In your Personal Homepage, in the Data and Integration Tools section, click the link for the tool you want to use:

- To import your contacts, click Data and Integration Tools, then click Import Your Contacts.

  For more information, see Importing Your Contacts (on page 291).
- To view information about your pending and completed import requests, click Data and Integration Tools, then click Import Request Queue.

  For more information, see Reviewing Import Results (on page 1831).

- To view information about your pending and completed export requests, click Data and Integration Tools, and then click Export Request Queue.

  For more information, see Viewing Your Export Requests (on page 762).
- To install Oracle CRM On Demand Desktop, click Data and Integration Tools, then click Oracle CRM On Demand Desktop, and follow the instructions to complete the installation.

  For more information, see Installing Oracle CRM On Demand Desktop (on page 1886).
- To link specific emails to account, contact, lead, opportunity or service request records in Oracle CRM On Demand, click Data and Integration Tools, then click Oracle Outlook Email Integration On Demand.

  For more information, see Adding Emails from Microsoft Outlook and Lotus Notes (on page 771).
- To access your pending and sent emails, click Data and Integration Tools, then click Email Monitor.

  For more information, see Accessing Your Pending and Sent Emails (on page 764).
- To embed a widget, click Embed CRM On Demand Content.

  For more information, see the following topics:

  - Embedding a Favorite Lists Widget (on page 767)
  - Embedding a Message Center Widget (on page 767)
  - Embedding a Reports Widget (on page 768)
  - Embedding a Simple List Widget (on page 769)

Related Topic

See the following topic for related information about data and integration tools:

- About On Demand Widgets (on page 766)

Viewing Your Export Requests

The Personal Export Request Queue page displays all of the pending and completed export requests that you submitted from List pages or through the Data Export Assistant. If a request is in the Pending Requests section, you can click Refresh to see if the request has completed. When the request has completed, you can drill down on a request to retrieve the output file.

NOTE: Depending on your privileges, some export requests might not be visible to you, or you might not be able to retrieve some output files.

About the Retention Period for Export Requests and Export Request Attachments

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

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

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

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

- Export Request Expiry (Days)
- Export Request Attachment Expiry (Days)

For information about updating these fields, see Configuring Company Settings (on page 1124).

The following procedure describes how to view your export requests.

To view export requests

1. In the upper-right corner of any page, click My Setup.
2. Click Data & Integration Tools.
3. Click Export Request Queue.

   The Personal Export Request Queue page appears, showing the details of the export requests. The following table describes the export request information.

Export Record Information	Description
Type	The type of request: Personal or Company.
Export Type	The type of export: ■ **Full**. A full export of your company's data. ■ **Partial.** A partial export of your company's data. ■ **List.** An export request made from a List page. Only exports performed by the logged-in user are displayed.
Record Type	The record type. For partial requests that include child records, the child record is indicated in the format *Parent*:*Child*, for example: Account:Contact.
List	For list export requests, this field indicates the name of the list.
Status	The status, for example: In Progress or Completed.
Client Name	The name of the client application.
Requested For	The user for whom the request was submitted.
Requested By	The user who submitted the request. An administrator can create a personal extract request for a user through Web services.
Submitted	The time and date when the export request was submitted.
Completed	The time and date when the export request was finished.

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

To review the details of an export request

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

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

For information about downloading and deleting export request attachments, that is, the ZIP files that contain the output from the export requests, see Downloading and Deleting Export Request Attachments (on page 764).

Downloading and Deleting Export Request Attachments

A ZIP file that contains output from a successful export request is available as an attachment in either the List Export Request Detail page (for an export request submitted from a List page) or the Export Request Detail page (for an export request submitted through the Data Export Assistant).

Depending on the privileges in your user role, you might be able to access and download the attachments for export requests through one or more of the following areas in Oracle CRM On Demand:

- **My Setup link.** For more information, see Viewing Your Export Requests (on page 762).
- **The administration pages in Oracle CRM On Demand.** For more information, see Reviewing Export Results (on page 1836) and Reviewing All Export Requests for Your Company (on page 1181).

If your user role has the Delete Export Request Attachments privilege, then you can delete any export request attachment to which you have access. Otherwise, you cannot delete any export request attachment, including the attachments for your own export requests.

The following procedure describes how to download an export request attachment from the List Export Request Detail page or the Export Request Detail page.

To download an export request attachment

- In the Export Request Attachment section of the page, select Download from the record-level menu for the attachment, and then save the ZIP file.

  The ZIP file consists of an export summary text file and a CSV file for each type of record that was exported. If the export was performed from a List page, then there is only one CSV file.

  NOTE: If you export the master audit trail, the CSV file contains the columns Record Type – Display Name and Field Modified – Display Name. These columns list the values displayed in the UI for the record type and modified field respectively. In contrast, the Field Modified and Record Type columns display only the record type's internal values.

The following procedure describes how to delete an export request attachment.

Before you begin: To perform this procedure, your user role must have the Delete Export Request Attachments privilege.

To delete an export request attachment

- In the Export Request Attachment section of the List Export Request Detail page or the Export Request Detail page, select Delete from the record-level menu for the attachment, and then confirm that you want to delete the attachment.

Accessing Your Pending and Sent Emails

Your personal email monitor shows the emails that were sent or are waiting to be sent by Oracle CRM On Demand to you, as well as the emails that were sent or are waiting to be sent by Oracle CRM On Demand on your behalf.

In the standard application, Oracle CRM On Demand retains sent emails and their attachments for a certain period, as follows:

- The email is retained for 30 days, and is then purged.

- The email attachment is retained for 7 days, and is then purged.

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

- Email Expiry (Days)
- Email Attachment Expiry (Days)

Emails that are sent to you when you import records, and emails that are sent to you when a scheduled event for analytics is executed on your behalf, can have files attached to them. If the size of a file that is to be attached to an outbound email is not greater than 2 MB, then Oracle CRM On Demand attaches the file to the email. If the size of the file is greater than 2 MB, then Oracle CRM On Demand zips the file. If the size of the zipped file is not greater than 2 MB, then the zipped file is attached to the email. Otherwise, the file is not attached to the email.

For emails that are sent to you when you import records, the log file is the first attachment, and the map file is the second attachment. The map file is attached to the email, provided that the combined size of the attachments is not greater than 2 MB. If the combined size of the attachments is greater than 2 MB, then Oracle CRM On Demand zips the map file and attaches it to the email, provided that the combined size of the attachments is not greater than 2 MB. Otherwise, the map file is not attached to the email.

You can access the unzipped files, as well as the emails themselves, through your personal email monitor, regardless of whether or not the files were sent with the emails.

In your personal email monitor, the Email List page displays the following fields:

- **Type.** This column displays one of the following values:
  - Customer. Emails that are sent by Oracle CRM On Demand to other users or to customers on your behalf.
  - Operations. Emails that are sent by Oracle CRM On Demand to Oracle CRM On Demand Customer Care on your behalf.
  - Service. Emails that are sent by Oracle CRM On Demand to you.
- **Sub-Type.** This column displays a value that indicates the type of operation from which the email originated. The sub-type is one of the following:
  - **Administration.** Emails that are sent to Oracle CRM On Demand Customer Care on your behalf.
  - **Assignment Manager – Lead.** Emails that are sent to you when the assignment manager assigns a lead to you, and emails that are sent by the assignment manager that have your email address in the Return Email field on an assignment rule for reassigning leads.
  - **Assignment Manager – SR.** Emails that are sent to you when the assignment manager assigns a service request to you, and emails that are sent by the assignment manager that have your email address in the Return Email field on an assignment rule for reassigning service requests.
  - **Batch Operations.** Emails that are sent to you when you perform actions such as deleting records using the Batch Delete feature, or assigning books to records using the Batch Assign Books feature.
  - **Export.** Emails that are sent to you when you export records.
  - **Forecast.** Emails that are sent to you or sent on your behalf in connection with forecasts.
  - **Fund Request.** Emails that are sent to you or sent on your behalf when fund requests are submitted.
  - **Import.** Emails that are sent to you when you import records.
  - **Integration Events.** Emails that are sent to you in connection with integration events and integration event queues.
  - **Partner Relationship.** (Specific to Oracle CRM On Demand Partner Relationship Management Edition). Emails that are sent to you when you are set up as a user within a partner organization.
  - **Service Allotments.** Emails that are sent to you in connection with service allotments and license allotments.
  - **Trial Account.** Emails that are sent to you in connection with a trial account for Oracle CRM On Demand.
  - **User Management.** Emails that are sent to you when you are set up as a user within Oracle CRM On Demand, and emails that are sent to you in connection with certain changes to your user account.

  - **Workflow.** Emails that are sent to you through workflow rules, and emails that are sent to you or to others by workflow rules that are triggered by your actions.
- **Status.** This column displays one of the following values:
  - **Queued.** The email request has not been processed yet.
  - **In Progress.** The email is being processed. Oracle CRM On Demand attempts to send an email three times. If on the third attempt the email fails to send, the status changes to Error.
  - **Sent.** The email has been successfully sent.
  - **Suppressed.** The email was not sent, because Oracle CRM On Demand does not send emails to the specified address.
  - **Error.** The email request did not complete because an error occurred.
- **From.** The email address of the person or company who sent the email.
- **Sent.** The date and timestamp the email was sent.
- **To.** The email addresses of all the recipients to whom the email was sent.
- **Initiated By.** The user sign-in ID of the user who initiated the email.
- **Subject.** The subject of the email.
- **Workflow Id.** If the email originated from a workflow action, then this column shows the ID of the workflow action. You can drill down to view the details of the workflow action.

The following procedure describes how to access your pending and sent emails.

To access your pending and sent emails

1. In the upper right corner of any page, click the My Setup global link.
2. In your Personal Homepage, click Data and Integration Tools.
3. In the Data and Integration Tools page, click Email Monitor.
4. To view the content of an email, click the email subject.
5. To download an attachment for a sent email, do the following:
   a. In the Email List page, click the Subject link for the email.
   b. In the Email Detail page, in the Email Attachments related information section, click the link in the Attachment field for the attachment you want to download.

NOTE: You cannot delete a pending or sent email from your personal email monitor.

About On Demand Widgets

Oracle CRM On Demand provides you with HTML code that you can use to embed a number of On Demand widgets in desktop applications that support Web widgets. You can also embed Web widgets in portals, or in any standalone Web page. A Web widget is a portable piece of third-party code that can be embedded in HTML. If your company administrator has made this feature available to you, HTML code that you can use to embed On Demand widgets in other applications is provided in the Embed CRM On Demand Content page in Oracle CRM On Demand.

When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears. Then, you can enter your sign-in details to access your Oracle CRM On Demand Favorite Lists, Message Center, and so on. You can open Oracle CRM On Demand in a new browser window by clicking Open Application.

Note: This feature is available in your Oracle CRM On Demand application only if it is enabled by your company administrator. To confirm if this feature is enabled in your Oracle CRM On Demand application, click the My Setup global link. If the feature is enabled, the Embed On Demand Content link is available on your Personal Homepage. If your company administrator has not assigned you permission to use On Demand widgets, and you try to sign in to an On Demand widget, the sign-in attempt fails.

The following On Demand widgets are available:

- **Favorite Lists Widget.** This On Demand widget displays your favorite Oracle CRM On Demand lists, for example, All Opportunities, My Accounts, and so on. Favorite Lists are located in the Action Bar of the Oracle CRM On Demand Homepage. For more information on embedding the Favorite Lists Widget, see Embedding a Favorite Lists Widget (on page 767).
- **Message Center Widget.** This On Demand widget allows you to access messages received in Oracle CRM On Demand without requiring you to first sign in to Oracle CRM On Demand. The Message Center is located in the Action Bar of the Oracle CRM On Demand Homepage. For more information on embedding the Message Center Widget, see Embedding a Message Center Widget (on page 767).
- **Reports Widget.** This On Demand widget displays reports and dashboards created in Oracle CRM On Demand. For more information on embedding the Reports Widget, see Embedding a Reports Widget (on page 768).
- **Simple List Widget.** This On Demand widget displays a one-column list of shortcuts to Oracle CRM On Demand records. For more information on embedding the Simple List Widget, see Embedding a Simple List Widget (on page 769).

TIP: If your theme uses a larger font, then a scroll bar might display in your favorite lists widget. You can remove this scroll bar by editing the height and width values for the Web Tab HTML fields in your widget. For more information, see Displaying External Web Pages, Reports, and Dashboards in Tabs (on page 1324).

Embedding a Favorite Lists Widget

You can embed your favorite lists from Oracle CRM On Demand (for example, All Opportunities, My Accounts, and so on) in desktop applications that support Web widgets. You can also embed them in portals and in standalone Web pages.

NOTE: This feature is available to you in Oracle CRM On Demand only if the feature is enabled by your company administrator.

To embed Favorite Lists

1. In the upper-right corner of any page, click the My Setup global link.
2. In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.
3. From the Favorite Lists Widget section, copy the HTML code to your application.

   When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.
4. Enter your Oracle CRM On Demand sign-in details to access your Favorite Lists data.

TIP: If your theme uses a larger font, then a scroll bar might display in your favorite lists widget. You can remove this scroll bar by editing the height and width values for the Web Tab HTML fields in your widget. For more information, see Displaying External Web Pages, Reports, and Dashboards in Tabs (on page 1324).

Embedding a Message Center Widget

You can embed the Oracle CRM On Demand Message Center in desktop applications that support Web widgets. You can also embed it in portals and in standalone Web pages. Using the Message Center widget, you can access messages received in Oracle CRM On Demand without logging in to Oracle CRM On Demand. The Message Center is located in the Action Bar of the Oracle CRM On Demand Homepage.

NOTE: This feature is available to you in Oracle CRM On Demand only if the feature is enabled by your company administrator.

To embed Message Center

1. In the upper-right corner of any page, click the My Setup global link.
2. In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.
3. From the Message Center Widget section, copy the HTML code to your application.

   When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.
4. Enter your Oracle CRM On Demand sign-in details to access the messages in your Message Center.
5. Click Refresh to access the new messages.

Embedding a Reports Widget

You can embed reports and dashboards from Oracle CRM On Demand in desktop applications that support Web widgets. You can also embed them in portals and in standalone Web pages without requiring you to log in to the Oracle CRM On Demand application. For more information about reports and dashboards, see Working with the Analytics Homepage (see Working with the Analytics Homepage on page 789).

Oracle CRM On Demand can generate the HTML that you need to embed reports and dashboards in widgets.

Before you begin: The report or dashboard that you want to embed must be stored under Shared Folders, in a folder to which you have access.

To embed a report

1. In the upper-right corner of any page, click the My Setup global link.
2. In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.
3. In the Reports Widget section, in the Type field, select Single Report.
4. Click the Lookup icon (magnifying glass), and then navigate to the report you require in Shared Folders.

   The Path field is automatically populated after you select the report.
5. If you want any prompts that are configured for the analysis to be displayed so that users can filter the analysis, then select the Display Report Prompts check box.
6. Specify whether the users who view the embedded analysis can refresh, print, or export the analysis:
   - **Refresh Link.** If this check box is selected, then the Refresh link is available and users can refresh the data in the analysis.
   - **Print Link.** If this check box is selected, then the Print link is available and users can print the analysis.
   - **Export Link.** If this check box is selected, then the Export link is available and users can export the analysis.
7. Click Show New HTML.
8. Copy the HTML code to your application.

   When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.
9. Enter your Oracle CRM On Demand sign-in details to access your report.

To embed a dashboard

1. In the upper-right corner of any page, click the My Setup global link.
2. In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.
3. In the Reports Widget section, in the Type field, select Dashboard.
4. Click the Lookup icon (magnifying glass), and then navigate to the dashboard you require in Shared Folders.

The Path field is automatically populated after you select the dashboard.

5 Click Show New HTML.

6 Copy the HTML code to your application.

When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.

7 Enter your Oracle CRM On Demand sign-in details to access your dashboard.

Embedding a Simple List Widget

This On Demand widget allows you to embed a simple list of records in desktop applications that support Web widgets. You can also embed them in portals and in standalone Web pages without requiring you to log in to the Oracle CRM On Demand application. The Simple List widget displays shortcuts to lists for the standard record types except Fund and Fund Request.

NOTE: This feature is available in your Oracle CRM On Demand application only if it is enabled by your company administrator.

To embed Simple Lists

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

2 In your Personal Homepage, in the Data and Integration Tools section, click Embed CRM On Demand Content.

3 In the Simple List Widget section, select a list from the menu.

4 Copy the HTML code to your application.

When you successfully embed this HTML code in your application, an Oracle CRM On Demand sign-in window appears.

5 Enter your Oracle CRM On Demand sign-in details to access your list.

6 To view a different list, click Configure.

NOTE: This action changes the available list for the duration of the session. You can change the list as many times as you want during your session. However, the list reverts to the original list after you log out of your session.

14 Working with Other Applications

Oracle CRM On Demand works with these applications to provide additional functionality:

- Microsoft Outlook and Lotus Notes Email Integration

  Through Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand, you can link specific emails to account, contact, lead, opportunity or service request records in Oracle CRM On Demand. This feature allows you to store critical emails with the records to which they relate.
- Microsoft Word

  You can use your Oracle CRM On Demand data to create mail merges and mass email in Microsoft Word using Oracle CRM On Demand Integration for Office.
- Microsoft Excel

  You can create refreshable offline Microsoft Excel reports containing your Oracle CRM On Demand data using Oracle CRM On Demand Integration for Office.
- Segmentation Wizard

  You can use the Segmentation Wizard to generate contact segments (that is, lists of contacts) based on a combination of account, contact, opportunity, and service request fields in Oracle CRM On Demand.

Checking Your System Requirements

Make sure your computer meets the system requirements before you install the software. For more information, see the Oracle CRM On Demand Web site.

Adding Emails from Microsoft Outlook and Lotus Notes

Oracle Outlook Email Integration On Demand (the Outlook Email Integration client) and Oracle Notes Email Integration On Demand (the Notes Email Integration client) are modules that allow you to add emails from Microsoft Outlook and from Lotus Notes to Oracle CRM On Demand. Those emails become a history of all your account interactions, and are available to the entire sales team.

When you add emails to the application (either already received or outgoing emails), you can:

- Add the email as a task record (a completed activity) linked to Account, Contact, Lead, Opportunity, or Service records in Oracle CRM On Demand
- Add the email recipients as Contacts, Leads, Opportunities, or Service Requests to Oracle CRM On Demand
- Create follow-up tasks or appointments from the emails in Oracle CRM On Demand
- Update Oracle CRM On Demand records directly from Outlook or Notes, including new email addresses
- Search Oracle CRM On Demand to find addressee information (the Outlook Email Integration client only)

To use the Outlook Email Integration client or the Notes Email Integration client, install it on your laptop or desktop computer.

NOTE: To use the Outlook Email Integration client or the Notes Email Integration client, you must have the Outlook/Notes Email Integration privilege in your user role.

Installing Oracle Outlook Email Integration On Demand

To install the Outlook Email Integration client, you download and run a setup program that runs an InstallShield wizard. The wizard creates an Outlook plug-in that adds the following icons or labels to the Outlook toolbar:

- Add to CRM On Demand. This appears in the Inbox toolbar.
- Send & Add to CRM On Demand. This appears in the Message window toolbar.
- CRM On Demand Find. This icon appears in the Message window toolbar.

Before you begin the Outlook Email Integration client installation:

- Make sure your computer meets the system requirements specified for Oracle Outlook Email Integration On Demand in Oracle CRM On Demand. For information on how to check the system requirements, see Oracle CRM On Demand Web site.
- If you are using Microsoft Outlook 2003, make sure Microsoft Word is not selected as your email editor. To verify that, click Tools in the Outlook menu bar and select Options. Under the Mail Format tab, clear the check box for this field: Use Microsoft Word to edit email messages.

To install the Outlook Email Integration client

1. Exit Microsoft Outlook, and close all its open windows.
2. Sign in to Oracle CRM On Demand.
3. Click the My Setup link at the top of any page.
4. On the Personal Homepage, click the Data & Integration Tools link.
5. On the Data & Integration Tools page, click the Oracle Outlook Email Integration On Demand link.
6. On the Oracle Outlook Email Integration On Demand page, read the information, and then click the Download Oracle Outlook Email Integration On Demand link.
7. On the second Oracle Outlook Email Integration On Demand page, read the additional information and click the Download Oracle Outlook Email Integration On Demand link.
8. In the window, you can:
   - Click Save to copy the Oracle_OEI_OnDemand.exe file to your hard drive to install while you are offline. (Recommended)
   - Click Run to begin the installation. You need to stay connected to the Internet to continue with the installation.
9. Follow the instructions to complete the installation.

Installing Oracle Notes Email Integration On Demand

Integrating Lotus Notes Email with Oracle CRM On Demand is a two-step process:

- Modifying the Lotus Notes Template
- Installing the Notes Email Integration client on the user's computer

Modifying the Lotus Notes Template

The Lotus Notes template is modified at the corporate level by your Lotus Notes administrator to expose the necessary code and UI elements that provide the interface with the Notes Email Integration client.

The following procedure describes how to download the Oracle Notes Email Integration On Demand files.

To download the Oracle Notes Email Integration On Demand files

1. Click the Training and Support link in the upper-right corner of any page, and sign in to My Oracle Support.

   If you already have an Oracle.com account, you can sign in to My Oracle Support without registering. If you do not have an Oracle.com account, you must register as a new user.

2 In the My Oracle Support page, click the Downloads link, and then click the link to download the Oracle Notes Email Integration On Demand files for the appropriate version of Oracle CRM On Demand.

Installing the Notes Email Integration Client

To install the Notes Email Integration client, you run a setup program that runs an InstallShield wizard. The wizard installs and registers the Notes Email Integration client that adds the following buttons to the folder and memo views in Lotus Notes:

- Add to Oracle CRM On Demand. This button appears in the Inbox and Sent Items folder views.
- Send & Add to Oracle CRM On Demand. This button appears in the New Memo and Reply Memo views.

Before you begin the Notes Email Integration client installation:

- Notes Email Integration client uses a routing server to dynamically retrieve a user's instance URL. Ensure that you have a router set up to work with your Notes Email Integration client installation. For more information, contact Customer Care.
- Check with your Oracle CRM On Demand administrator to see if the Notes Email Integration client has been enabled at your company. Your company's Lotus Notes administrator must make modifications to your company's corporate Lotus Notes template to enable the Notes Email Integration client before it will work.

  CAUTION: Do not attempt to install the Notes Email Integration client until you are sure that it has been enabled at your company. Doing so will require the Notes Email Integration client to be uninstalled and reinstalled before it will work.

- To download the installation package for the Notes Email Integration client, click the Training and Support link in the upper-right corner of any page to open the Training and Support Center page. On that page, click the Knowledge and Training link, and then sign in to My Oracle Support. In the My Oracle Support page, click the Downloads link, and then download the installation package.
- Make sure your computer meets the system requirements specified for Oracle Notes Email Integration On Demand in Oracle CRM On Demand. For information on how to check the system requirements, see Oracle CRM On Demand Web site.

To install the Notes Email Integration client

1. Exit from Lotus Notes, and close all of its windows.
2. Obtain the Notes Email Integration client installation file from your Oracle CRM On Demand administrator, and save it to your desktop.
3. From your desktop, run the installation file, and then follow the instructions to complete the installation.

Uninstalling Oracle Outlook Email Integration On Demand or Oracle Notes Email Integration On Demand

You can uninstall Oracle Outlook Email Integration On Demand or Oracle Notes Email Integration On Demand at any time, using the Microsoft Windows Add/Remove Programs utility.

Adding Email Information to Oracle CRM On Demand

When adding email to Oracle CRM On Demand, the combined file size for the email and attachment cannot exceed 5 megabytes (MB). Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand do not support compressed files as attachments, for example, .zip, .rar, .7z, .cab and so on.

NOTE: When opening or creating emails in Outlook 2007, CRM On Demand buttons appear on the ribbon in the CRM On Demand Group on the Message tab.

To add email information

1. Highlight or open the email that you want to add to Oracle CRM On Demand.
2. In Microsoft Outlook, click Add to CRM On Demand. In Lotus Notes, click Add to Oracle.

3 In the Sign In window, enter the email address and password you normally use to access Oracle CRM On Demand.

NOTE: You only need to sign in one time for each Outlook or Notes session; you do not have to log in again until you close Outlook or Notes. Data that is sent to and from Oracle CRM On Demand from the Outlook Email Integration client or the Notes Email Integration client is always encrypted for security.

4 To automatically link emails during this session with the contact names in the To, Cc, and From fields, select Yes for Automatic Association.

When using Automatic Association, the application searches the emails in Oracle CRM On Demand and automatically adds this email as a completed task. If no match is found, the window appears for you to manually search and link the email to records.

5 Click the Sign In button.

The application searches records in Oracle CRM On Demand and displays the results in the Create a Task window, as described in the following table.

This area	Contains these records
Selected Records	Initially, this area shows the contact records whose email addresses in Oracle CRM On Demand match the ones in the To, Cc, and From fields in the emails. You can move records from other areas in this window to the Selected Records. When you click Save in this window, the application saves the email to all the records in this area and to account records linked to them. **NOTE:** A contact must have a linked account record for this email to be saved to it.
Email Recipients Not Found	This area shows the names appearing in the To or Cc fields in the email that cannot be mapped to existing contacts in Oracle CRM On Demand.
Related Records	This area shows the records in Oracle CRM On Demand that are linked to the contact records corresponding to the email recipients, for example, Opportunities.

6 From the Create a Task window, you can do the following:

To do this	Follow these steps
Add follow-up tasks or appointments to Oracle CRM On Demand	1 In the Options After Saving area, select the Create a New Task or Create a New Appointment check box. 2 Click Save. 3 In the New Task or New Appointment form, update the information and save the record.
Add a new opportunity or service request linked to an email recipient	1 In the Selected Records area, right click on the email recipient name. 2 Select Add New Opportunity to On Demand or Add New Service Request to On Demand. 3 Update the information in the New Opportunity or New Service Request form.

	4 Click Save.
Add the email recipient as a contact or lead	1 In the Email Recipients Not Found area, right click on the email recipient name. 2 Select Add to On Demand (for a new contact record) or Add New Lead to On Demand (for a new lead record). 3 Update the information in the New Contact or New Lead form. 4 Click Save. The email recipient's name moves to the Selected Records area in the window.
Add this email as a completed task	1 Make sure a record appears in the Selected Records area. 2 Click Save. The email is saved as a completed task linked to each record in the Selected Records area along with accounts linked to those records. The default values shown in the Activity Details are used unless you update them.
Link this email to another record	1 In the Create a Task window, double-click on any found records to move them to the Selected Records area. 2 (Optional) Update the default settings in the Activity Details area. 3 Click Save. This email is saved as a task linked to the selected records with the values shown in the Activity Details area.
Remove the record from the Selected Records area	■ Double-click the record. It moves to the left side of the window so that it won't be linked to this email.
Search Oracle CRM On Demand for additional contacts, accounts, opportunities, leads, or service requests	1 In the Search drop-down list, select the record type. 2 Enter the name for which you want to search. 3 Click Submit. Records matching the name appear in the Search Results area.
Update a record	1 Right click on the record. 2 Select Edit. 3 Update the information in the Edit form. 4 Click Save.
Update an email address in Oracle CRM On Demand from this email	1 In the Search Results area, right click on the record. 2 Select Associate email address.

	3 In the Associate Contact with Recipient window, select the updated email address from the drop-down list. 4 Click Save. The new email address appears in the contact record.
View record information, such as the record name, email address, and related record names	■ Move your mouse over the record and keep it there until the tool tip appears, showing this information.

To send an email and add the email to Oracle CRM On Demand

1 In Microsoft Outlook, click New in the toolbar. In Lotus Notes, click the New Memo or Reply button.
2 (Optional) Add email recipients from the Oracle CRM On Demand Contacts records:
   a In the Message window, enter a name in the CRM On Demand Find field.
   b Press Enter.
   A window displays the contacts found in Oracle CRM On Demand.
   c Select one of these options: To, CC, or BCC.
   d Click Select.

   NOTE: If you enter an email address longer than 100 characters, then the Outlook Email Integration client ignores that email address and the task is not added to Oracle CRM On Demand.

3 Enter additional information as you normally would for sending an email.

   NOTE: When using Oracle Outlook Email Integration On Demand, you must upload images as an attachment to an email. If you embed an image within an email with this integration, then the image is excluded from the email.

4 Do one of the following:
   - In Microsoft Outlook, click Send & Add to CRM On Demand.
   - In Lotus Notes, click Send & Add to Oracle.

   When you click Save, the email is sent to the recipients you selected, and the email is saved according to the information in the Create a Task window.

Using Oracle CRM On Demand Integration for Office

Oracle CRM On Demand Integration for Office is comprised of the following downloadable template files:

- Mail Merge for Word
- Reports and Analysis for Excel
- Segmentation Wizard

These template files insert special toolbars into Microsoft Word and Microsoft Excel. Using these toolbars, you can manipulate Oracle CRM On Demand data in Microsoft Word or Excel to create direct mail, mass email, refreshable offline reports, and lists of contacts (called segments) for use in marketing campaigns.

The following sections describe how to use the Oracle CRM On Demand Integration for Office templates:

- Using Mail Merge for Word (on page 777). Describes the On Demand Integration toolbar in Microsoft Word, provides information about opening Mail Merge for Word templates properly, and explains how to create a direct mailing or mass email in Microsoft Word using data from Oracle CRM On Demand.

- Using Reports and Analysis for Excel (on page 780). Describes the On Demand Integration toolbar in Microsoft Excel, provides background information about creating reports using the Reports and Analysis for Excel template, and describes how to run existing reports and create new reports using the Reports and Analysis for Excel template.
- Using Segmentation Wizard (on page 783). Describes the Target Builder toolbar in Microsoft Excel, provides background information about segment types, and describes how to create, upload, and export segments.

NOTE: To use Oracle CRM On Demand Integration for Office, your administrator must have enabled Web Services in Oracle CRM On Demand.

NOTE: Networks that leverage authenticated proxies are not supported.

Using Mail Merge for Word

Using Mail Merge for Word, you can download your Oracle CRM On Demand data into Microsoft Word to create a direct mailing or mass email. Before doing so, you must set up your Mail Merge for Word templates.

Click a topic to see step-by-step procedures to do the following:

- Downloading the Mail Merge for Word Template (on page 778)
- Creating Mail Merge for Word Templates (on page 778)
- Creating Direct Mailings or Mass Emails with Mail Merge for Word (on page 779)

Related Topics

See the following topic for related information:

- About the On Demand Integration Toolbar in Mail Merge for Word (on page 777)

About the On Demand Integration Toolbar in Mail Merge for Word

Mail Merge for Word contains the On Demand Integration toolbar, which is used to create mail merges with Oracle CRM On Demand data.

NOTE: If you are using Microsoft Office 2007, the On Demand Integration toolbar is available in the Add-Ins tab. Click the Add-Ins tab to display all the On Demand Integration options.

The following table describes the options available in the On Demand Integration toolbar in Mail Merge for Word.

Toolbar Option	Description
1. Get On Demand Data	Allows you to sign in to Oracle CRM On Demand and download data to Microsoft Word. The options are: Contacts, Leads, Accounts, Opportunities, Service Requests, and Use Saved List. Choosing Use Saved List allows you to select an existing data source stored as a list on your machine.
2. Refine Recipients	Allows you to choose which recipients from the downloaded data you want to correspond with.

Toolbar Option	Description
3. Refine Message	Contains the following options: - **AutoText.** Allows you to insert predetermined fields into the message. For example, you can insert a closing line into each message using the AutoText option. - **Insert Oracle Field.** Allows you to insert fields from the Oracle CRM On Demand record into the message. For example, you may choose to insert Full_Name into the greeting of each message.
4. Preview	Allows you to preview each message. You can use the arrows to scroll through each one.
5. Print or Send Message	Allows you to merge the data into the template and print, merge into a separate Word document, or merge into individually addressed email messages and send them out.
6. Log as On Demand Activity	Allows you to create an activity in Oracle CRM On Demand as a record of the correspondence. This single activity is associated with each of the message's recipients. The text of the template sent is automatically inserted into the description of this activity.

Downloading the Mail Merge for Word Template

The Mail Merge for Word template adds the On Demand Integration toolbar to Microsoft Word. The following procedure describes how to download the template.

To download the Mail Merge for Word template

1. Click the Training and Support link at the top of Oracle CRM On Demand, and sign in to My Oracle Support.

   If you already have an Oracle.com account, you can sign in to My Oracle Support without registering. If you do not have an Oracle.com account, you must register as a new user.
2. In the My Oracle Support Knowledge page, click the Downloads link, and then click the link to download Oracle Mail Merge for Word template.
3. Follow the instructions provided on the Web page to download the template.

Creating Mail Merge for Word Templates

The Mail Merge for Word toolbar (the On Demand Integration toolbar) is attached to each template file. The following procedure describes how to create a Mail Merge for Word template, using the On Demand Integration toolbar. Using the toolbar to create Mail Merge for Word templates allows you to make sure that your Oracle CRM On Demand data will support the personalization you are embedding in the template.

About Opening Mail Merge for Word Templates

To make sure that Mail Merge for Word is attached to any templates that you create or modify, you must always open the original template files. To make sure you have opened the original template file, check the title bar. The document title must have a .dot file name extension.

NOTE: Do not double-click the file to open it, because this action opens a new Word document, based on the template file. If you save any changes while in this mode, you will be saving a normal Word document, which does not have the On Demand Integration toolbar attached.

To create or modify Mail Merge for Word templates

1 Right-click the Mail Merge for Word template that you downloaded and saved locally, and select Open.

  The file opens in Microsoft Word.

2 Create a typical correspondence using the On Demand Integration toolbar and Word functionality.

  You can refine recipients, insert Oracle CRM On Demand fields, preview, and so on. For specific details about how to create a correspondence using the toolbar, see Creating Direct Mailings or Mass Emails with Mail Merge for Word (on page 779).

3 Before saving the template, unlink the data source from the template as follows:

  a Click the Main document setup button on the Microsoft Word Mail Merge toolbar.

  b In the Main Document Type dialog box, select the Normal Word document radio button.

    NOTE: If the Microsoft Word Mail Merge toolbar is not visible, access it by clicking View, Toolbars, and then Mail Merge in the Word menu bar. If you are using Microsoft Office 2007, click the Mailings tab, then Start Mail Merge.

    CAUTION: If you save and publish a template before disconnecting the data source, the file will attempt to connect to a data source on the local machine when it is used.

4 Do one of the following:

  - If you are saving a new template, select File, then Save As.
  - If you are saving changes to an existing template, select File, then Save.

Creating Direct Mailings or Mass Emails with Mail Merge for Word

Using Mail Merge for Word, you can download Oracle CRM On Demand data, and merge it with a Word document. The following procedure uses Contacts as an example, but you can also create mail merges using Oracle CRM On Demand data from Leads, Accounts, Opportunities, and Service Requests or using a recipient list you have saved locally.

NOTE: The maximum number of records that can be downloaded is 4000.

To create a direct mailing or mass email using Mail Merge for Word

1 Open the Word template file you want to use for your direct mailing.

2 In the On Demand Integration toolbar, click Get On Demand Data, then Contacts.

3 In the Oracle On Demand - Sign-in dialog box, complete the appropriate fields and click Sign In to sign in to Oracle CRM On Demand.

4 In the Define List dialog box, do the following:

  a In the Filters tab, define the criteria for the data you want to download into Word.

    For more information about creating filters, see Working with Lists (on page 125).

  b In the Fields tab, select the specific fields of information you want to download. A maximum of 40 fields can be selected.

    The system will scan the current template and automatically select each of the fields that are needed. You can select additional fields to insert into the template to further personalize the communication.

    NOTE: You should also select additional fields of information that may be required to send the communication. For example, if you are going to be sending a mass email, you must include the email address in the recipient file.

  c Click OK.

5 In the Save List? dialog box, do one of the following:

   a. To save the list locally for later use, click Yes. In the Save As dialog box, complete the appropriate fields, and then click Save.
   b. If you plan on using the list only once, click No and then click OK. Selecting this option automatically saves the recipient list as a temporary file which will be deleted after use.
6. In the Mail Merge Recipients dialog box, you can do the following:
   - Clear check boxes to remove recipients from this correspondence.
   - Select check boxes to include recipients in this correspondence.

   When you have finished editing recipients, click OK.

   NOTE: You can reopen the Mail Merge Recipients dialog box by clicking Refine Recipients in the On Demand Integration toolbar.
7. Click Refine Message to insert Oracle CRM On Demand fields or auto-text into the Word document. For more information about the Refine Message button, see Using Mail Merge for Word (on page 777).
8. Click Preview and use the arrow buttons to scroll through each message to see how they will appear when printed or sent by email.

   For more information about the Preview button, see About the On Demand Integration Toolbar in Mail Merge for Word (on page 777).
9. Click Print or Send Message and then do one of the following:
   a. To send to another Word document, select Merge to Document.
   b. To print, select Merge to Printer.
   c. To distribute as a mass email, select Send as Email.
   d. To distribute as a mass fax, select Send as Fax.

      NOTE: To distribute correspondence as a mass fax, you must first configure Microsoft Office. For more information, search for “fax” in your Microsoft Office help files.
10. (Optional) Click Log as On Demand Activity to create a single Oracle CRM On Demand activity that will be associated with every contact selected for the mail merge. The Description field of the activity is automatically populated with the text of the template. In the Tasks dialog box, complete the appropriate fields, and then click Save.

Using Reports and Analysis for Excel

Using Reports and Analysis for Excel, you can download Oracle CRM On Demand data into Microsoft Excel, and work with it to create reports. This section includes the following topics:

- About the On Demand Integration Toolbar in Reports and Analysis for Excel (see About the On Demand Integration Toolbar in Reports and Analysis for Excel on page 780)
- About Creating Reports with Reports and Analysis for Excel (on page 781)
- Downloading the Reports and Analysis for Excel Template (on page 781)
- Creating Reports Using Reports and Analysis for Excel (on page 782)

About the On Demand Integration Toolbar in Reports and Analysis for Excel

Reports and Analysis for Excel contains the On Demand Integration toolbar, which you can use to create reports using data from Oracle CRM On Demand.

NOTE: If you are using Office 2007, the On Demand Integration toolbar is available in the Add-Ins tab. Click the Add-Ins tab to display all the On Demand Integration options.

The following table describes the On Demand Integration toolbar in Reports and Analysis for Excel.

Toolbar Option	Description
Configure On Demand Report	Allows you to sign in to Oracle CRM On Demand and download data to Excel.
Refresh On Demand Report	Updates data you are viewing in Excel with the most recent data available from Oracle CRM On Demand.

About Creating Reports with Reports and Analysis for Excel

Using Reports and Analysis for Excel, you can download Oracle CRM On Demand data and manipulate it in Microsoft Excel. When you click Configure On Demand Report on the On Demand Integration toolbar in Reports and Analysis for Excel, the Configure Reports dialog box appears. Using the Configure Reports dialog box, you can edit existing reports, create new reports, or remove existing reports. The following table describes the options available in the Configure Reports dialog box.

Button	Comments
Edit Report	Click to modify the filter settings and fields included in the selected report.
New Report	Click to create a custom report for the selected record type. You can set filter criteria against each of the standard and custom fields for that record type. For information about setting filter criteria in lists, see Working with Lists (on page 125).
Remove Report	Click to remove a report from the Excel workbook.
Run Report	Click to run the currently selected report. After running, the report is added as a new worksheet to the workbook.
Exit	Click to exit the Configure Reports dialog box.

Downloading the Reports and Analysis for Excel Template

The Reports and Analysis for Excel template adds the Oracle CRM On Demand Integration toolbar to Microsoft Excel. The following procedure describes how to download the template.

To download the Reports and Analysis for Excel template

1. Click the Training and Support link at the top of Oracle CRM On Demand.
2. Click the Support tab.
3. Click My Oracle Support Login.
4. Click Sign In and then enter your sign in credentials.
5. In the Search Knowledge Base field, enter 1800044.1, and start the search.
6. Click the link for Oracle Reports and Analysis for Excel Template.
7. Follow the instructions provided on the Web page to download the template (ZIP file).
8. Decompress the ZIP file to a local directory.

Creating Reports Using Reports and Analysis for Excel

This section contains the following topics:

- Running Existing Reports
- Creating New Reports

Running Existing Reports

The following procedure describes how to run an existing report using Reports and Analysis for Excel. It also includes an optional step that describes how to edit an existing report. After running the report, you can work with the data in your workbook. You can build pivot tables, pivot charts, charts and graphs, and calculate fields from information included in your report worksheets.

NOTE: When adding pivot tables, pivot charts, and graphs and charts you should create them in new worksheets, otherwise when you refresh your reports they could be overwritten.

To run existing reports

1. Open the Excel template file.
2. In the On Demand Integration toolbar, click Configure On Demand Report.
3. In the CRM On Demand - Sign-in dialog box, complete the appropriate fields, and click Sign In to sign in to Oracle CRM On Demand.
4. In the Configure Reports dialog box, from the Select Record Type drop-down list, select the record type you want for your report. Choices are:
   - Account
   - Contact
   - Opportunity
   - Lead
   - Service Request
   - Solution
   - Household
   - Custom Object 1
   - Custom Object 2
   - Campaign Recipients
   - Custom Object 1 Accounts
   - Custom Object 1 Opportunities
   - Custom Object 2 Accounts
   - Custom Object 2 Opportunities

   The available reports for the selected record type appear in the Available Reports list. You can edit an existing report, remove an existing report, or create new reports. For more information about the Configure Reports dialog box, see About Creating Reports with Reports and Analysis for Excel (on page 781). For more information about creating new reports, see Creating New Reports in this topic.
5. Select an existing report from the Available Reports list.
6. (Optional) Click Edit Report to modify the filter settings and fields included with the currently selected report.
   a. In the Define Report dialog box, in the Filters tab, define the criteria for the data you want to download.

      For more information about creating filters, see Working with Lists (on page 125).
   b. In the Fields tab, select the specific fields of information to be downloaded and then click OK.

      NOTE: You can select up to 100 Fields for inclusion in a report.
7. Click Run Report.

The requested data is inserted into the Excel workbook as a new worksheet labeled with the report name.

8. Click Exit in the Configure Reports dialog box to begin editing the data in Excel.
9. Click Refresh On Demand Report to update the data that you are editing in Microsoft Excel with the most recent data from Oracle CRM On Demand.

   NOTE: When you click Refresh On Demand Report, each report worksheet in the workbook is overwritten with the most recent information from Oracle CRM On Demand.

Creating New Reports

The following procedure describes how to create and run a new report using Reports and Analysis for Excel.

To create new reports

1. Open the Excel template file you want to use to create your report.
2. In the On Demand Integration toolbar, click Configure On Demand Report.
3. In the CRM On Demand - Sign-in dialog box, complete the appropriate fields, and click Sign In to sign in to Oracle CRM On Demand.
4. In the Configure Reports dialog box, from the Select Record Type drop-down list, select the record type you want to use for your report. Choices are: Account, Contact, Lead, Opportunity, Service Request, or Solution.

   The available reports for the selected record type appear in the Available Reports list.
5. Click New Report to create your own query.

   NOTE: Creating a new report allows you to create a custom report for a selected record type. You can set filter criteria against each of the standard and custom fields for that record type.
6. In the Define Report dialog box, do the following:
   a. In the Filters tab, define the criteria for the data you want to download.

      For more information about creating filters, see Working with Lists (on page 125).
   b. In the Fields tab, select the specific fields of information to be downloaded and then click OK.

      NOTE: You can select up to 100 Fields for inclusion in a report.
7. In the Save Reports dialog box, enter a name for this report in the Report Name field for future use, and then click Save.
8. In the Configure Reports dialog box, select the report you just created and click Run Report.

   The report you created appears as a worksheet in Excel labeled with the name you indicated.
9. After adding all the reports you need, click Exit to close the Configure Reports dialog box and begin to work with the data in your worksheet.
10. Click Refresh On Demand Report to update the data that you are editing in Microsoft Excel with the most recent data from Oracle CRM On Demand.

    Clicking Refresh On Demand Report updates every report worksheet in the workbook.

Using Segmentation Wizard

Using Segmentation Wizard, you can define contact segments, based on multiple record types. A segment is a list of contacts from Oracle CRM On Demand. This section includes the following topics:

- Exporting Segments (on page 787)

About the Target Builder Toolbar in Segmentation Wizard

Segmentation Wizard contains the Target Builder toolbar, which is used to create contact segments using data from Oracle CRM On Demand.

The following table describes the Target Builder toolbar in Segmentation Wizard.

Toolbar Option	Description
Manage Segments	Allows you to create and update segments using data from Oracle CRM On Demand, and to export segments as CSV files.
Refresh Segment	Updates the data that you are viewing in Microsoft Excel with the most recent data available from Oracle CRM On Demand.
Upload Segments	Uploads the list of segments from Segmentation Wizard to Oracle CRM On Demand.

About Segmentation Wizard

You can use Segmentation Wizard to generate contact segments (that is, lists of contacts) based on a combination of account, contact, opportunity, and service request fields in Oracle CRM On Demand. The resulting segments are multidimensional customer lists for targeting campaigns.

You can create the following segment types:

- **Dynamic segment.** Dynamic segments can be refreshed whenever necessary. When you refresh a dynamic segment, the filters saved with the segment are reapplied to the records in Oracle CRM On Demand, and the segment is updated to include new records. The new segment overwrites the previous segment.
- **Static segment.** Static segments are preserved as a snapshot. With a static segment, you can also manually select the contacts to include in the list. You cannot refresh a static segment.
- **External segment.** External segments are based on data from an external system or source. Segmentation Wizard finds Oracle CRM On Demand records that match the external list of data and returns linked contacts.

Additionally, Segmentation Wizard allows you to:

- Upload segments as campaign recipients to Oracle CRM On Demand
- Export segments as CSV files

Scenario for Using Segmentation Wizard

Your marketing team is planning to hold a marketing event in Germany for executives in the automotive sector. The event will allow executives at your company to assist in closing large, active opportunities before the end of the quarter.

To generate a segment to support this business need, you apply these filters:

- Contact Job Title is set to President.
- Account Location is set to Germany.
- Account Industry is set to Automotive.
- Opportunity Sales Stage is set to Negotiation Opportunity.
- Revenue is greater than €1,000,000.

The resulting segment is a list of contacts in Oracle CRM On Demand that meet all the criteria that you defined.

For example, to be included in the list, a contact record must (in addition to having the job title of President) be linked to account and opportunity records that meet the criteria for those record types.

Downloading Segmentation Wizard

Segmentation Wizard contains the Target Builder toolbar, which is used to create contact segments using data from Oracle CRM On Demand. The following procedure describes how to download Segmentation Wizard (an Excel file).

To download Segmentation Wizard

1. Click the Training and Support link at the top of Oracle CRM On Demand, and sign in to My Oracle Support.

   If you already have an Oracle.com account, you can sign in to My Oracle Support without registering. If you do not have an Oracle.com account, you must register as a new user before you sign in.
2. In the Support tab, click Add-On Applications.
3. In the Add-On Applications page, click Segmentation Wizard.
4. Follow the instructions provided on the Web page to download the file.
5. Save the file to a local directory.

Creating Segments

When you create a segment, you first specify the type of segment that you want to create. Then, you set up filters to define the segment, enter a name for the segment, and generate the segment from Oracle CRM On Demand records.

The following procedure describes how to create a segment.

Before you begin. Make sure the filter values that you enter match those in the records you want to include in your segment. For more information on filtering lists in Oracle CRM On Demand, see Working with Lists (on page 125).

NOTE: The Segmentation Wizard does not support multiselect picklist fields.

To create a segment

1. Open the Segmentation Wizard (Excel) template file.
2. In the Target Builder toolbar, click Manage Segments.
3. If prompted, select any options to enable macros.
4. If prompted, sign in using your Oracle CRM On Demand email address and password.
5. In the Manage Segments window, click New.
6. In the New Segment window, select the type of segment:
   - **Dynamic.** Allows you to save the criteria for the segment, and refresh the segment with the latest information from Oracle CRM On Demand.
   - **Static.** Allows you to initially filter a list of contacts, and then selectively choose which contacts to include in the segment.
   - **External.** Allows you to use an external list of data (external CSV file) to retrieve a list of contacts from Oracle CRM On Demand. This segment type allows you to base your segments on a third-party file that you might have purchased or extracted from other internal data systems.

     Segmentation Wizard generates the segment by matching records in Oracle CRM On Demand with the records in your CSV file. You can specify the fields that you want to use when matching records.

7 (Dynamic or Static segments types only) Set up the filters to apply to the different record types in the Set Segment Filters window.

NOTE: Filter values for numeric fields must be entered without using separators for thousands, and must use a period (.) as the decimal separator. For example, enter 1000.50 for one thousand and fifty cents in a U.S. currency field.

a Click the tab corresponding to the record type for the first filter.

When setting filters on any record type, contacts that are linked to records meeting those criteria are included in the segment.

b Select the Field, Condition, and Filter Value to define the first filter.

c Repeat Step a and Step b until you have defined all your filters for this segment.

d Click Save Segment.

8 (External segment types only) Set up the segment as follows:

a In the External List window, specify the type of records that the external list contains, and specify if you want to apply additional contact filters.

b In the Find External List window, select the CSV file.

c In the External List window, select the fields that you want Segmentation Wizard to use to determine matches between the CSV file and the Oracle CRM On Demand fields, then map the fields from your CSV file to the corresponding Oracle CRM On Demand fields, and click Save.

9 In the Save Segment window, enter a name for the segment, and click Save.

Segmentation Wizard generates a contact list of records that meets all the criteria you set up. The list appears in a newly created worksheet with the label you used as your segment name.

NOTE: When Segmentation Wizard generates the segment, it returns only those records that you have access to in Oracle CRM On Demand.

10 (Optional, Static segments only) Select or clear contacts in the List Members window, and click Save.

The following procedure describes how to refresh a dynamic segment.

NOTE: When you refresh a dynamic segment, the segment is overwritten and cannot be restored.

To refresh a dynamic segment

1. Open the Segmentation Wizard (Excel) template file.
2. In the Target Builder toolbar, click Refresh Segment.
3. In the Refresh Dynamic Segments window, select the segment.
4. Click Refresh.

The following procedure describes how to update a dynamic or static segment.

To update a dynamic or static segment

1. Open the Segmentation Wizard (Excel) template file.
2. In the Target Builder toolbar, click Manage Segments.
3. Select the dynamic or static segment that you want to update.
4. Click Edit.
5. Do one of the following:
   - For Static Segments, select or clear contacts in the Select Segment Members window.
   - For Dynamic Segments, update the filters.
6. Click Save.

Segmentation Wizard generates the segment using the newly defined criteria.

Uploading Segments

You can upload the segments that you create in Segmentation Wizard to Oracle CRM On Demand. When you upload a segment, Oracle CRM On Demand links the contacts in the list to a campaign in Oracle CRM On Demand. The contacts appear in the Recipients section on the Campaign Detail page.

The following procedure describes how to upload a segment to Oracle CRM On Demand.

Before you begin. In Oracle CRM On Demand, create the campaign that you want to link to the segment.

To upload a segment

1. Open the Segmentation Wizard (Excel) template file.
2. In the Target Builder toolbar, click Upload Segments.
3. In the Upload Segments window:
    a. Select the segments that you want to upload.
    b. Select the campaign for this segment.
    c. Select the delivery status for the recipients that you are uploading.

       The value that you select appears in the Delivery Status column in the Recipients section on the Campaign Detail page.
    d. Click Upload.

   NOTE: You can upload a total of 10,000 recipients to a single campaign.

Exporting Segments

You can export a segment as a CSV file, which you can then distribute to third parties. The following procedure describes how to export segments.

To export a segment

1. Open the Segmentation Wizard (Excel) template file.
2. In the Target Builder toolbar, click Manage Segments.
3. In the Manage Segments window, select the segment that you want to export, and click Export.
4. Move the fields that you want to include to the Selected Fields area, arrange them in the order you want, and then click Export.
5. In the Save As window, name the file, and save it to the location that you want.

15 Analytics

Through the Analytics tab, you can:

- Create historical and real-time analyses.
- Create dashboards that display analyses.
- Access a set of prebuilt analyses.

NOTE: To access the Analytics tab your user role must have the Access V3 Analytics privilege.

In addition, the Analytics functionality provides the following features:

- The ability to search for analyses and dashboards.
- Advanced functions, views and graph types, and conditions for analyses.
- Support for analyses that can be displayed in mobile devices and in browsers running the iOS operating system.

NOTE: The terms Report and Analysis are equivalent and are used interchangeably in this documentation.

For more information, see the following topics:

- Working with the Analytics Homepage (see Working with the Analytics Homepage on page 789)
- Using the Catalog (on page 790)
- Managing Favorites (on page 794)
- Creating a Filter (on page 797)
- Creating a Condition (on page 798)
- Designing an Action (on page 800)
- Designing an Analysis (on page 807)
- Dashboards (on page 1087)

Working with the Analytics Homepage

The Analytics Homepage is the starting point for working with analyses and dashboards in the catalog.

Click a topic to display more information about using the Analytics features:

- Opening an Analysis, Dashboard, Action, or Condition (on page 790)
- Using the Catalog (on page 790)
- Running Analyses (on page 791)
- Reviewing Report Data (on page 791)
- Printing Analyses (on page 792)
- Downloading Analyses (on page 792)
- Deleting Analyses (on page 793)
- Renaming Analyses (on page 793)
- Managing Favorites (on page 794)

- Copying and Moving Analytics Objects (on page 795)
- Copying Analytics Objects from Staging to Production (on page 796)
- Creating a Filter (on page 797)
- Designing a Filter (on page 798)
- Creating a Condition (on page 798)
- Designing a Condition (on page 799)
- Designing an Action (on page 800)
- Creating an Action (on page 801)
- Setting Up Folders in Analytics (on page 803)
- Setting Up User Visibility to Shared Analytics Folders (on page 804)
- About Scheduling Analyses and Dashboards to Execute Automatically (on page 806)
- Designing an Analysis (on page 807)
- Getting Started with Analytics (on page 816)
- Making Custom Analyses Public (on page 1046)
- Creating Dashboards (on page 1090)
- Editing Dashboards (on page 1091)
- Creating Dashboard Prompts (on page 1093)
- Working with My Dashboard (on page 1093)
- Working with Briefing Books (on page 1106)

Related Topics

See the following topics for related information:

- About Visibility to Records in Analytics (on page 807)
- About Custom Fiscal Calendar in Analytics (on page 815)
- About Limitations in Analytics (on page 817)
- Prebuilt Dashboards - Customer Dashboard (on page 1104)
- Prebuilt Dashboards - Marketing Effectiveness Dashboard (on page 1105)
- Prebuilt Dashboards - Overview Dashboard (on page 1104)
- Prebuilt Dashboards - Pipeline Dashboard (on page 1105)
- Prebuilt Dashboards - Sales Effectiveness Dashboard (on page 1105)
- Prebuilt Dashboards - Service Dashboard (on page 1106)

Opening an Analysis, Dashboard, Action, or Condition

The Analytics tab provides several methods for opening existing analytic objects (analyses, actions, dashboards, and so on). These methods are:

- **Open** menu. Pull down the Open menu and choose from the drop-down menu.
- **Recent** list. The Recent list in the Analytics tab shows all recently accessed analytic objects. Click the Open link beneath the object.
- **Favorites** menu. Pull down the Favorites menu to choose analytic objects you have added to My Favorites.
- **Catalog** menu. Pull down the Catalog menu to access all analytic objects.

Using the Catalog

You can use searching functionality to find objects in the catalog.

To search for objects from the Home tab

1. In the Search field on the Home tab, click the down arrow and select the object type for which you want to search.
2. Place your cursor in the field next to the Search field and enter part or all of the object's name or description.
3. Click Search to begin the search. The Catalog page is displayed with the results that match your search criteria.

Use the Catalog page's functionality to provide search criteria. This searching method is useful when you know the object's name, location, or type.

To search for objects from the Catalog

1. Click Catalog.
2. In the Catalog page, click Search.
3. In the Search pane, specify the search criteria. Consider the following options:
   - **Search**: All objects and folders whose names contain the characters that you enter are displayed.
   - **Location**: Select the folders to search. Administrators and users with administrative permissions can search the catalog root folder.
   - **Type**: Select the kind of object for which you are searching (for example, Condition or Filter).
4. Click Search.

Folders or objects that satisfy the search criteria display in the Catalog area.

Running Analyses

Although you can view analyses on different pages in your application, the Analytics tab provides a single point of access to all analyses.

To run an analysis

1. In the Analytics tab, click Catalog.
2. Navigate to an analysis.
3. Click Open on the analysis to be run.

Related Topics

See the following topics for related information:

- Printing Analyses (on page 792)
- Reviewing Report Data (on page 791)

Reviewing Report Data

Report data is shown in lists, tables, or graphs. For many reports, you can select different categories to reorganize the same data from a different perspective. For example, you can display your accounts grouped first by region, and then change the selection to display the same data grouped by industry.

For lists and tables, null values appear as empty fields, except for the following:

- Id fields, such as Account Id, Contact Id, and so on where they appear as negative numbers
- Record type name fields, such as Account Name, Contact Full Name, Custom Object 1 Name, and so on where they appear as *Unspecified*

Printing Analyses

TIP: Printing in landscape mode optimizes the appearance of an analysis.

To print from the Catalog

1 In Oracle CRM On Demand, click the Analytics tab.
2 Click Catalog.
3 Navigate through the folders and select an analysis.
4 Click the Printer icon in the icon bar and choose either Printable PDF or Printable HTML.
The analysis prints in a new Web browser tab.

To print a report from within Analytics

1 In Oracle CRM On Demand, click the Analytics tab.
2 Open an existing analysis using either the Home tab, the Catalog tab, or the Favorites list.
3 Pull down the Print icon in the icon bar and choose either Printable PDF or Printable HTML.
The analysis prints in a new Web browser tab.
4 Close the report window.

Downloading Analyses

You can download an analysis if your role can access the analysis.

To download an analysis from the Catalog

1 In the Analytics tab, click Catalog.
2 Navigate to the analysis.
3 Right-click (or pull down the More menu, depending on the view type) on the analysis, choose Export, and then choose one of the following:
   - PDF
   - Excel
   - Powerpoint
   - Web Archive
   - Data (requires further selection from the following:)
      - Excel
      - CSV
      - Tab Delimited
      - XML
4 Follow the onscreen instructions to download the analysis.

To download an open analysis

1 Navigate to an analysis and click Open.
2 At the bottom of the screen, click Export, then choose one of the following:
   - PDF

- Excel
- Powerpoint
- Web Archive
- Data (requires further selection from the following:)
  - Excel
  - CSV
  - Tab Delimited
  - XML

Importing Your Downloaded Report

Within Excel, choose File then Open to import your downloaded report. If the data appears in a single column, select that column and choose Data then Text to Columns. In some versions of Excel, you can also double-click the downloaded file icon in Windows Explorer to import your downloaded report.

Analytics reports downloaded in CSV mode do not delimit the data automatically when opening in Microsoft Excel. After downloading a report in CSV mode, use Microsoft Excel's Convert Text to Columns wizard with the comma-delimiter option. For more information about the compatibility of the different versions of Microsoft Excel, contact your internal IT support team.

Delimiting a CSV file in Microsoft Excel

Perform the following procedure to delimit a CSV file in Microsoft Excel (Windows 2003 or 2007).

To delimit a CSV file in Microsoft Excel

1. Press CTRL-A to select all the data.
2. In the Data tab, click Text to Columns.

   The Convert Text to Columns Wizard appears.
3. Select Delimited, then click Next.
4. Select Comma and deselect all the other check boxes, then click Next.
5. Select General, and then click Finish.

Deleting Analyses

You cannot delete shared custom reports unless you have the Manage Custom Reports privilege. You cannot delete personal custom reports unless you have the Manage Personal Reports privilege.

To delete reports that you have created

1. In the Analytics tab, click Catalog.
2. Navigate to the analysis.
3. For the analysis to be deleted, right-click or pull down its More menu (depending on the view type) and choose Delete.
4. At the prompt, click OK to confirm that you want to delete the analysis.

Renaming Analyses

You cannot rename shared custom reports unless you have the Manage Custom Reports privilege. You cannot rename personal custom reports unless you have the Manage Personal Reports privilege.

To rename analyses that you have created

1. In the Analytics tab, click Catalog.
2. Navigate to the analysis.
3. For the analysis to be renamed, right-click or pull down its More menu (depending on the view type) and choose Rename.
4. At the prompt, enter a new name for the analysis.
5. To preserve references (such as dashboards) to the original analysis name, select Preserve references to old name of this item.
6. Click OK.

Managing Favorites

Use the Favorites functionality to bookmark the catalog objects that you view regularly or want to view again at another time. After you flag objects as favorites, you can use the Manage Favorites dialog to organize your favorites by creating categories and rearrange your favorites into the order that you find most intuitive. You can access a list of the objects that you marked as favorites and any categories that you created by clicking Favorites.

There are multiple ways to add an object to your Favorites list. You can bookmark as favorites the catalog objects that you view regularly or want to view again. For example, you might regularly view the Loyal Customers analysis in the catalog. You flag the analysis as a favorite. After you add an object to your Favorites list, the object's icon is updated to include a gold star.

To add an object to your Favorites list by using the Catalog page:

1. Go to the Catalog page and browse for the object that you want to add to your Favorites list.
2. Right-click on the object and choose Add to Favorites. The object is added to your Favorites list and a star icon is added to the object's icon.

To add an object to your Favorites list while viewing or editing the object:

1. Open or edit the object.
2. Hover over Favorites and click Add to Favorites. The object is added to your Favorites list.

Accessing Favorites Objects

After you tag objects as favorites, you can use the Favorites menu to display your list of favorites and browse for and select a favorite object.

To access favorite objects

1. Hover over the Favorites menu. The list of the objects that you marked as favorites displays.
2. Scroll through the list of objects and categories, and click an object to select it.

Organizing Favorites

Use these tasks to organize the items on your Favorites list.

To create a Favorites category:

1. In the Analytics tab, click Favorites, and then choose Manage Favorites. The Manage Favorites dialog displays.

2 In the Category Tree or the Selection Category area, browse to and select the location where you want to add a new category.
3 On the toolbar, click New Category. The New Category dialog displays.
4 Enter a unique name for the category and click OK. The new category displays.

To rearrange your favorite objects:

1 In the Analytics tab, click Favorites, and then choose Manage Favorites. The Manage Favorites dialog displays.
2 In the Category Tree or the Selection Category area, browse to the location of the categories or objects that you want to rearrange. You can perform the following actions to rearrange your favorites.
   - Select an object or category and click the move buttons to move the object up or down in your Favorites list.
   - Drag and drop objects into categories. Drag and drop categories into other categories to nest them.
   - Copy objects or categories from one location and paste them into another location.
   - Rename categories.
   - Sort the selected categories or objects within a category by ascending or descending alphabetic order.
3 Click OK. Your rearranged objects and categories are saved and display in your Favorites list.

Removing Objects from Favorites

You can remove items from your Favorites list. You can remove from your Favorites list those objects that you no longer need to access regularly. For example, you can remove from your Favorites list the previous year's Loyal Customers analysis that you no longer need to access regularly. After you remove an object from your Favorites list, the object's icon changes from an icon with a gold star to the object's standard icon.

To remove an object from your Favorites list by using the Catalog page:

1 Go to the Catalog page and browse for the object that you want to remove from your Favorites list.
2 Right-click the object and then choose Remove from Favorites. The object is removed from your Favorites list.

To remove an object from your Favorites list while viewing or editing the object:

1 Open or edit the object in its designated viewer or editor.
2 Hover over the Favorites menu. The list of the objects that you marked as favorites displays.
3 Click Remove from Favorites. The object is removed from your Favorites list.

To remove an object from your Favorites list by using the Manage Favorites dialog:

1 Hover over the Favorites menu. The list of the objects that you marked as favorites displays.
2 Click Manage Favorites. The Manage Favorites dialog displays.
3 Browse for and select the object that you want to remove.
4 Click Delete.
5 Click OK. The object is removed from the list.

Copying and Moving Analytics Objects

You can copy and move analytics objects from one folder to another in two ways:

- By editing the object and then using save as to save the object into another folder.

NOTE: Use this method when you want to copy an object from My Folders to a shared folder.

- Using the Copy/Paste feature in the Catalog page in Analytics.

The following procedure describes how to copy analytics objects.

To copy an object to a different folder

1. In Oracle CRM On Demand, click the Analytics tab.
2. Click Catalog.
3. In the Catalog page, navigate to the object to be copied.
4. Copy the object either by clicking copy icon in the Catalog page icon bar, or by accessing the object's More menu (either by right-clicking the object or by pulling down the More menu, depending on the selected Catalog's list view type) and choosing Copy.
5. Navigate to the destination folder.
6. Click the Paste icon in the Catalog page icon bar.

The following procedure describes how to move an object from one folder to another.

To move an object to a different folder

1. In Oracle CRM On Demand, click the Analytics tab.
2. Click Catalog.
3. In the Folders pane, display the folders as a tree view. If necessary, click the tree view icon at the top of the Folders pane.
4. Navigate the folders until the object to be moved appears in the right-side pane.
5. Drag the object to the destination folder.

   The object's name no longer appears in the right-side pane, and now appears under the destination folder.

Copying Analytics Objects from Staging to Production

You can copy analytics objects (all object types except conditions) and folders containing analytics objects from your staging environment to your production environment. Be aware that this feature does not copy analytics objects from one version of Oracle CRM On Demand to another, both your staging environment and production environment must be using the same version of Oracle CRM On Demand.

The copy method is to archive the analytics object or folder in the staging environment and then unarchive it in the production environment. The following procedures describe how to do the archive and unarchive steps.

To archive an analytics object or folder in your staging environment

1. Sign on to your staging environment.
2. Click the Analytics tab.
3. Click Catalog.
4. Navigate to the analytics object or folder to copy.
5. Under the folder or analytics object's name, right-click (or pull down the More menu, depending on the view type) and choose Archive.

   The Archive dialog box opens.
6. Click OK.

   The Opening *report name*.Catalog dialog box opens.
7. Make sure Save File is selected and click OK.

The file browser dialog box opens.

8 Navigate to a folder on your computer and click Save.

All dialog boxes close and the archive (.Catalog) file is now saved on your computer.

9 Sign out of your staging environment.

To unarchive an archive file in your production environment

1 Sign in to your production environment.
2 Click the Analytics tab.
3 Click Catalog.
4 Navigate to a destination folder to hold the unarchived object or folder.
5 Under the destination folder right-click (or pull down the More menu, depending on the view type) and choose Unarchive.

   The Unarchive dialog box opens.

6 Click Browse and navigate to the archive (.Catalog) file you saved on your computer in the previous procedure, and then click Open.
7 In the Replace drop-down menu, choose from the following:
   - **All.** Pastes all possible files from the archive into the destination folder.
   - **Old.** Pastes all possible files from the archive, but does not overwrite any existing files unless they are older than the source.
   - **None**. (Default) Pastes all possible files, from the archive but does not overwrite any existing files in the destination folder.
8 Click OK.

   The analytic object or folder is now copied from staging to production.

Note: The file size limit is 20 megabytes.

Be aware that if you unarchive an object that references custom objects or custom fields that you created in Staging and that were not recreated in Production, then the unarchived object is unlikely to work as it does in the staging environment. Also, if you unarchive objects that reference other analytics objects that do not yet exist in the production environment, then these objects are unlikely to work as expected.

The unarchived object(s) or folders will inherit the visibility rules from the destination folder if any.

Creating a Filter

You can create named filters that you can reuse in multiple analyses and dashboards. By creating a reusable named filter, you are making the analyses and dashboards designed by yourself and others both more consistent and easier to create

To create a named filter

1 Click the Analytics tab.
2 Pull down the New menu and choose Filter.
3 In the Select Subject Area dialog box, click a subject area.

For information on designing filters, see Designing a Filter (on page 798).

Designing a Filter

You can create named filters that you can reuse in multiple analyses and dashboards. By creating a reusable named filter, you are making the analyses and dashboards designed by yourself and others both more consistent and easier to create.

To create a named filter:

1. From the Analytics Home page, pull down the New menu, and choose Filter.
2. In the Select Subject Area dialog, choose the subject area for which you want to create a filter.
3. From the Subject Areas pane of the Filter editor, double-click a column for which you want to create the filter.
4. In the Operator field of the New Filter dialog, choose an operator for the filter. The operator list from which you can choose is populated based on the type of column that you selected.
5. In the Value field, specify one or more values to use when applying the filter or condition. You can:
   - Type values, using a semicolon to separate the values.
   - Select values from the list or calendar.
6. To search for specific values, click Search in the list box. The Select Values dialog is displayed, where you can search for and select values.
7. Click the Add More Options button to add a SQL expression, Session Variable, Repository Variable, or a Presentation Variable to the filter. Note that if you are setting the filter's value with a SQL expression or variable, then leave the Value field blank.
8. Select the Protect Filter box to protect the filter's value from being overridden by a matching prompt's value or when the user navigates to another report within the analysis. When you navigate from one report to another report within an analysis, any prompt values that you specified in the first report can be transferred to the second report.
9. To convert the filter to SQL statements, select the Convert this filter to SQL box.

   The Advanced SQL Filter dialog is displayed.

   Note: This is a one-way conversion. After you select the Convert this filter to SQL box, you can no longer view and edit the filter in the Edit Filter dialog.

   After you convert the filter to SQL statements, you can only view and edit the filter item as SQL statements in the Advanced SQL Filter dialog.
10. When you are finished specifying the filter's criteria, click OK.
11. Click Save.
12. In the Save As dialog, navigate to a folder to save the filter in, fill in the Name (maximum 512 characters) and (optional) Description fields, then click OK.

Creating a Condition

Conditions are objects that return a single Boolean value based on the evaluation of an analysis.

To create a condition

1. Click the Analytics tab.
2. Pull down the New menu and choose Condition.
3. In the New Condition dialog box, complete the following fields:
   a. For Create condition based on, pull down the menu and choose the object type Analysis to base the condition on.

   b. Click Browse and navigate to a specific object of the type you selected, then click OK
   c. Depending on the object type and the specific item you selected, there may be filters within the object that are prompted (meaning that while displaying the object you can choose values to alter the contents of the display). These prompts are interactive so you can adjust the output based on your selections. However, a condition cannot interactively make those selections, so you must click the Edit (pencil icon) for each such parameter and choose one operator and value. For example, choose the *is less than* operator and choose a value.
   d. For *True If Row Count,* choose an operator and a value.
4. (Optional) To test the condition, click Test.

When the condition is run, Analytics evaluates the object using the parameters (if any) and the *True If Row Count* test to determine a true or false value for the condition. Conditions return only a true or false value.

For more information about conditions, see Designing a Condition (on page 799).

Designing a Condition

Conditions are objects that return a single Boolean value (true or false) based on the evaluation of an analysis. If the analysis returns any rows, then the condition is true. If the analysis returns no rows, then the condition is false.

For example, a condition might evaluate whether the results of an analysis return a number of rows greater than 0:

- If the analysis returns at least one row, then the condition evaluates to true.
- If the analysis does not return any rows, then the condition evaluates to false.

You use conditions to determine whether:

- Actions links (which when clicked run actions) are displayed in dashboard pages
- Sections and their content are displayed in dashboard pages

You can also use a different kind of condition to determine whether action links are enabled in analyses.

About Named Conditions

A named condition is a condition that you define and then save by name in the presentation catalog so that you can reuse it in dashboard pages. You create a named condition when you create a condition from the New menu by selecting Condition under Analysis and Interactive Reporting.

About Inline Conditions

An inline condition is a condition that you define at the point of use and do not save by name in the catalog. Instead it is saved as part of the dashboard page. An inline condition is automatically deleted when the dashboard page that contains it is deleted. This simplifies catalog management for conditions that make sense.

You can create an inline condition when you:

- Add an action link to a dashboard page and specify that the action link is to be displayed conditionally.
- Add a section to a dashboard page and specify that the section is to be displayed conditionally.

Creating Named Conditions

You can create named conditions that you can reuse in dashboard pages.

To create a named condition

1. In the Analytics tab pull down the New menu and choose Condition.
2. In the New Condition dialog, complete the following fields:
   a. In the Create condition based on box, select the condition is to be based on an analysis.

b. Edit any prompted filters, as desired.

Note: If you specify values for any prompted filters, then these values cannot be overridden at the point of use.

c. Specify the evaluation criteria as follows:

   - In the Condition true if number or rows area:
   - In the Operator box, select the operator to apply to the row count.
   - In the Row Count box or boxes, specify the row count to be evaluated.

d. (optional) Click Test to test the condition.

Note: If a condition is based on an analysis that is private, you cannot save it in the /Shared Folders folder.

3. Click Save
4. In the Save As dialog, navigate to a folder to save the condition in, fill in the Name (maximum 512 characters) and (optional) Description fields, then click OK

Designing an Action

Actions allow data and calculations to become interactive. Actions provide functionality to navigate to related content or a Web page

You can include actions in analyses and dashboard pages. Actions can be executed:

- Explicitly by end users who click action links that are embedded within:
  - Analyses on column headings, column values, and hierarchy level values, in certain views, such as graphs, and on totals and grand totals within tables and pivot tables
  - Dashboard pages
- Directly from the Home page or from the Catalog page

For example, a sales director wants to meet with the sales manager of any region where sales drop below a certain threshold. You might embed an action object into the sales director's dashboard to enable the sales managers to schedule such a meeting simply by clicking a link.

About Action Links and Action Link Menus

Action links and action link menus provide interactivity to data presentations. An action link is a link to an action that you have embedded in an analysis or a dashboard page that, when clicked, runs an associated action.

In analyses, multiple action links are displayed in a list. On a dashboard page, you can add action links as standalone links or you can group multiple action links together on action link menus. An action link menu lets users select, from a list of action links, the appropriate action to be executed based on the business insight that they gained from the data.

Additionally, you can conditionally show each action link, depending on the data. This powerful functionality enables you to set up context-sensitive menus that present users with the appropriate next steps based on the data that is displayed.

Action links that you add to analyses are displayed to users in the following views:

- Funnel graphs
- Gauges
- Graphs
- Map views
- Performance Tiles
- Pivot tables

- Tables
- Trellises
- Treemaps

Note: Action links are not included in exported formats, for example, Excel and PDF.

For more information, see the following:

- Creating an Action (on page 801)
- Setting Action Options (on page 801)
- Selecting Content for an Action (on page 802)

Creating an Action

You can create named actions which content designers can add to analyses and dashboard pages.

To create a named action

1. In the Analytics tab, pull down the New menu and choose Action under Actionable Intelligence.
2. In the Navigate prompt choose either:
   - Navigate to BI Content (Create an Action to navigate to an Analysis or Dashboard Page
   - Navigate to a Web Page (Create an Action to navigate to a URL)
3. In the New Action pop-up, click Save Action..
4. In the Save Action dialog, select a folder, fill out the Name (maximum 512 characters) and Description fields, and click OK.

For more information, see the following:

- Designing an Action (on page 800)
- Setting Action Options (on page 801)
- Selecting Content for an Action (on page 802)

Setting Action Options

You must specify settings for each action you create. You specify the settings for a new action in the Create New Action dialog when you do any of the following tasks:

- Creating Named Actions
- Adding Actions to Analyses
- About Adding Actions to Dashboard Pages

To set action options

1. Click the Create New Action link and then select the type of action to create.
2. Depending on the type of action that you are creating or editing, do one of the following, as described in the following table:

Action Type	What You Do
Navigate to BI Content	Select the Oracle BI content to which to navigate.
Navigate to a Web page	In the URL field, enter the URL of the web page. Tip: You can highlight the URL in the browser and copy and paste it into the URL field.

3 (optional for a Navigate to Web Page action) To define parameters for the action, click Define Parameters to display the Define Parameters list.
   a To add a parameter, click the Add Parameter button. A new parameter row is added to the Define Parameters list. (Note that the Add Parameter button is not available for all action types.)
   b Specify the column values for each parameter:
      - In the Name column, if you are creating a new parameter, then enter the name of the parameter. Use a name that is unique within the action.
      - In the Prompt column, if you want the user to provide the parameter value, then enter the prompt to display to the user.
      - In the Value column, to provide a parameter value, enter or select the value. If you want the user to specify the value, then leave this field as is.
      - In the Fixed column, specify whether to allow users to see but not set the parameter. This column is not available for all action types.
      - In the Hidden column, specify whether to hide the parameter from users. This column is not available for all action types.
      - In the Optional column, specify whether the parameter requires a value before the action can be executed.
4 (optional) Customize information displayed to the user when the action runs:
   a Click Options to display the Action Options dialog.
   b Specify the customization that you want.
   c Click OK.

   This functionality is available only for actions where it is appropriate to display information to users.
5 Click OK.

   If you are creating a named action, then a dialog is displayed where you specify the information for saving the action.

For more information, see the following:

- Designing an Action (on page 800)
- Creating an Action (on page 801)
- Selecting Content for an Action (on page 802)

Selecting Content for an Action

You can create named actions which content designers can add to analyses and dashboard pages.

To create an action

1 In the Analytics tab, pull down the New menu and choose Action under Actionable Intelligence.
2 In the Navigate prompt choose Navigate to BI Content (Create an Action to navigate to an Analysis or Dashboard Page).

   The Select Content for Action dialog box appears.
3 Select an analysis to use for this action and then click OK.
4 In the new Action pop-up, click Save Action.
5 In the Save Action dialog, select a folder, fill out the Name (maximum 512 characters) and Description fields, and click OK.

For more information, see the following:

- Designing an Action (on page 800)
- Creating an Action (on page 801)
- Setting Action Options (on page 801)

Setting Up Folders in Analytics

You can set up folders and limit user visibility to those folders. After that, only users granted visibility to certain folders can display reports saved in these folders on their Reports Homepage or see the folders in the catalog.

You can also set up folders inside the Dashboards folder. After that, only users granted visibility to certain folders inside the Dashboards folder can see them in the catalog.

For setting visibility into folders inside the Dashboards folder, you need the Manage Dashboards privilege and the Manage Roles and Access privilege. For setting visibility into all the other folders, you need the Manage Custom Reports privilege and the Manage Roles and Access privilege.

Setting up folders consists of these general steps:

1. Create folders and subfolders.
2. Assign user visibility to folders.

   For more information about setting up user visibility, see Setting Up User Visibility to Shared Analytics Folders (on page 804).
3. Populate folders with analytics objects.

To create a folder

1. Click the Analytics tab.
2. On the Home page, click Catalog.
3. In the Catalog page, click the New icon and choose Folder.
4. Enter the folder name and click OK.

   NOTE: Restrict folders names to 255 characters or less. Visibility cannot be configured for shared folders with names greater than 255 characters.

   For more information, see Setting Up User Visibility to Shared Analytics Folders (on page 804).

Folder Path Name Limitation

There are maximum character limits on the path to every object, however the limit varies per instance, which makes specifying the limit impractical. To avoid complications due to maximum character limits, follow these guidelines:

- Make object names as short as possible
- Make folder names as short as possible
- Avoid nesting folders within folders within folders.

To rename a folder

1. In the Catalog page, right click on a folder in the right pane, and then choose Rename from the context menu.
2. Enter the new name.
3. (Recommended) Select Preserve references to old name of this item.
4. Click OK.

To delete a folder

- In the Catalog page, right click on a folder in the right pane, and then choose Delete from the context menu.

To populate a folder with analytics objects

- Do one of the following:
  - Create the object, and then save it in the folder.
  - Copy or move an existing saved object from one folder to another.

    For more information on copying and moving objects, see Copying and Moving Analytics Objects (on page 795).

Setting Up User Visibility to Shared Analytics Folders

By default, all user roles have visibility to each shared folder. You can override the default by manually linking specific roles to individual folders. However, if you manually link a user role to a folder, Oracle CRM On Demand revokes visibility for all other user roles (except the Administrator role) to that folder. You must continue to manually link each role that should have visibility. Be aware that if you remove all manually linked roles, the default visibility does not return. Removing all linked roles results in a folder that no one can access, you must manually link all roles to that folder to grant access.

NOTE: To assign visibility to the Migrated Company Wide Shared Folder your user role must have the Access Migrated Company Wide Shared Folder privilege.

If you link a role to a folder with subfolders, then the role is also linked to all its subfolders. To change this, navigate to the subfolder and make any needed changes. For each folder, the access level that is assigned to your user role controls your permissions in that folder. The access level permissions are as follows:

- **Read.** (Default) You can open and display objects in the folder.
- **Change/Delete.** You can display, edit, and delete objects in the folder, as well as create new folders and rename subfolders within the current folder. However, you cannot rename the current folder using this access level.

Your access level also controls the Manage Objects, Open Object, and Save Object actions as shown in the following table.

Action	Description
Manage Objects	- **Read.** You can display only the contents. You cannot enable any actions. - **Change/Delete**. You can create new folders and copy, delete, move, and rename objects.
Open Object	This action shows only the nonempty folders for which your user role has a Read or Change/Delete access level.
Save Object	You can save objects to only those folders for which your user role has the Change/ Delete access level.

The Administrator role has visibility to all folders at all times. Consequently, the Administrator role cannot be manually linked to or removed from a folder. Any custom role created by copying the Administrator role inherits this same visibility to all folders at all times, regardless of whether or not the role is manually linked to or unlinked from folders.

The following privileges affect the content that appears in the Manage Shared Folder Visibility page:

- Manage Dashboards
- Manage Roles and Access

- Manage Custom Reports

The following table describes the contents of the Manage Dashboard Visibility page, based on your privileges.

Manage Roles and Access	Manage Dashboards	Manage Custom Reports	Contents of Manage Dashboard Visibility Page
Yes	Yes	No	Displays the Dashboards folder
Yes	No	Yes	Displays all folders but not the main Dashboards folder
Yes	Yes	Yes	Displays the Dashboards folder and the other folders in the catalog

The Manage Custom Reports analytics privilege enables a user role to create and save custom reports in any report folder regardless of whether the individual user has visibility access to folders.

The Manage Dashboards analytics privilege enables a user role to create and save custom dashboards in any folder inside the Dashboards folder, regardless of whether the individual user has visibility access to folders.

To assign visibility to shared folders

1. Click the Analytics tab.
2. Click Folders in the Manage pane The Folders List page displays all subfolders for the Shared Custom Analyses parent folder.

   NOTE: All users have visibility to the Shared Custom Analyses root folder.
3. Select a folder, as follows:
   a. If the folder where you want to set up visibility is a top-level folder, click the folder name.
   b. If the folder where you want to set up visibility is a subfolder, click the Subfolders link for the parent folder until you reach the appropriate folder, then click the folder name.
4. To give specific roles visibility to the folder:
   a. In the Folder Details page, click Add Roles.
   b. Click Select next to each Role field to link user roles.
   c. Click Save. All selected roles are assigned the Read access level.

      The Folder Details page appears displaying all selected roles in the Associated Roles tab.
   d. To change a role's access level from Read to Change/Delete, click Edit next to the role.
      - The Edit Role Access page appears.
      - In the Access Level drop-down menu, choose either Read or Change/Delete.
      - Click Save.
5. To remove a role that was previously given visibility to the folder:
   a. In the Folder Details page, pull down the record level menu (triangle icon).
   b. Click Remove.
6. To edit the access level for a role that was previously given visibility to the folder:
   a. In the Folder Details page, click Edit next to the role to be changed.
   b. In the Edit Role Access page, modify the Access Level.
   c. Click Save.

TIP: When you set visibility for a subfolder, you can click the folder name in the Parent Folder field to return to the Folder Details page for the parent folder.

Sharing Private Reports

Visibility to your private reports folder is restricted to the Oracle CRM On Demand session user only. The My Analyses folder contains reports created by the user and then stored as private. Users who have the Manage Custom Reports privilege can share Private reports with others by saving them in the Company Wide Shared Folder.

To share a private report

1. In Oracle CRM On Demand, click the Analytics tab.
2. On the Home page, locate and open an analysis.
3. When the analysis opens, click Edit.
4. In the upper-right corner, click the Save As icon.
5. In the Save As dialog box, select a destination folder (such as Company Wide Shared Folder) within the Shared Folders folder, and click OK.

About Sharing and Hiding Prebuilt Reports

Prebuilt reports are shared to all company users.

The Access Analytics Reports - View Prebuilt Analyses privilege controls whether or not shared prebuilt analyses are exposed to users for specific roles. If Access Analytics Reports - View Prebuilt Analyses is enabled for a user role, all shared prebuilt analyses appear on their Analytics tab. If the privilege is not enabled for the user role, then all prebuilt analyses are hidden.

To hide specific shared prebuilt reports and display others, deselect the Access Analytics Reports - View Prebuilt Analyses privilege. This hides all shared prebuilt reports. Then to share specific prebuilt reports, go to Analytics, open the report that you want to share, and save it in a shared folder within Company Wide Shared Folder. Configure the shared folder visibility as needed.

NOTE: The Access Analytics Reports - View Prebuilt Analyses privilege determines whether or not you have access to prebuilt reports. If you do not have this privilege enabled, regardless of where you access the reports from, such as the Analytics tab, Home page, dashboard, Web applet, or Web tab, the reports are not displayed, and you might get an error message.

About Scheduling Analyses and Dashboards to Execute Automatically

Your administrator can configure Oracle CRM On Demand to perform the following tasks at specified intervals:

- Execute an Analytics object on behalf of one or more specified users. The Analytics object can be an analysis, a dashboard, or a dashboard page.
- Send the results that are generated for a user to that user as an email attachment.

The specified user's access rights determine the results that are generated for that user.

Your administrator configures Oracle CRM On Demand to perform these tasks by creating scheduled events for the Analytics record type. For more information, see Creating Scheduled Events for Analytics (on page 1521).

Considerations When Embedding Analytics Objects

Oracle CRM On Demand does not support using a direct Analytics URL reference either from within the Oracle CRM On Demand application or from an external embedded URL. Do not use this URL reference to embed

Analytics content in custom Web tabs, Web applets, or Web links because these customizations might not work after an upgrade. You cannot request support for problems encountered using a direct Analytics URL. Only problems that occur within the Oracle CRM On Demand application are supported.

Instead, use the custom Homepage reports, Web applets of the Report and Dashboard types, Web tabs of the Report and Dashboard types, and Web links of the Report and Dashboard types to embed analytics objects in Oracle CRM On Demand. For more information, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 1236).

Designing an Analysis

If your role includes the Manage Personal Reports privilege or the Manage Custom Reports privilege, then you can design and create analyses. For more information, see Getting Started with Analytics (on page 816).

If your role includes the Manage Custom Reports privilege, then you can also make custom reports public. For more information, see Making Custom Analyses Public (on page 1046).

Related Topics

For additional information about managing analyses, see the following topics:

- Setting Up Folders in Analytics (on page 803)
- Setting Up User Visibility to Shared Analytics Folders (on page 804)
- Reviewing Report Data (on page 791)
- Printing Analyses (on page 792)
- Running Analyses (on page 791)
- Downloading Analyses (on page 792)
- Deleting Analyses (on page 793)
- Renaming Analyses (on page 793)
- Copying and Moving Analytics Objects (on page 795)

About Visibility to Records in Analytics

Several settings in Analytics control visibility. They are applied in the following order:

1. Access All Data in Analytics setting (in role privileges)
2. Reporting Subject Areas setting in user profile
3. Historical Subject Areas setting in user profile
4. Books and the Book selector
5. User Delegation
6. Role-Based Can Read All Records setting (in company and user profiles)

A company administrator using these settings can control what records appear on the reports that you run. For example, a manager can display the manager's own opportunities and the opportunities of employees who report to that manager, but a sales representative's settings limit the opportunities to only the opportunities that belong to the sales representative.

Access All Data in Analytics Setting

Users with the Access All Data in Analytics privilege in their role setups have complete visibility to all of the data in the entire organization, including records marked Private. This privilege is typically given to the company administrator. This privilege overrides any Analytics Visibility setting.

If the user role does not have the Access All Data in Analytics privilege, the Analytics Visibility setting specified in the company or user profile determines which data users can display in reports.

Reporting Subject Areas Setting

This setting is generally used for all users in the organization who are not company administrators. This setting is available on both the company and user profiles. If this setting is not defined on a user's profile, then the company profile setting applies. This setting has the following values:

- **Manager Visibility.** Allows you to display your own data and all the data that is directly owned by your subordinates, including records marked Private
- **Team Visibility.** Allows you to display your own data and all the data that has been shared with you through the account and opportunity teams and through group assignment

Historical Subject Areas Setting

This setting is generally used for all users in the organization who are not company administrators. This setting is available on both the company and user profiles. If this setting is not defined on a user's profile, then the company profile setting applies.

This setting has the following possible values:

- **Manager Visibility.** Allows you to display your own data and all the data that is directly owned by your subordinates, including records marked Private
- **Team Visibility.** Allows you to display your own data and all the data that has been shared with you through the account and opportunity teams and through group assignment
- **Full Visibility**. Combines manager and team visibility to display data that is owned by you and your subordinates and data shared with you and your subordinates.

Books and the Book Selector

If you have the Full Visibility setting, the Books feature allows further control of which data displays in reports. Using the Book selector on the Reports pages, you can restrict the data to that contained in a book and its subbooks, if it has any. This feature is available only if you are assigned to one or more books and are using an Analytic (not Reporting) subject area. If you have the Access All Data in Analytics privilege, you continue to display all data no matter which book is selected. Also, Role-Based Can Read All Records visibility overrides Book visibility in Analytics.

A company administrator can set a default book for the Book selector on the Reports pages for each user. You specify this setting in the Default Book for Analytics field on the user profile.

NOTE: If the default book on your profile is set to a book that cannot contain data or is set to a book that you do not have access to, then you get an error indicating that access is denied.

The data associated with a book, which is used to implement territory management and alignment activation in Oracle CRM On Demand, is also supported in Analytics through book visibility. When you select a book in the Book selector, Analytics shows only the active account and contact records associated with the book. The records whose association with a book have been deleted or will become active do not appear in reports.

Book Ownership

Users and custom books can own account and contact records. Book ownership provides the ability to simulate territories. When a record is owned exclusively by a book, that record is visible only through the book visibility. Similarly, when a record is owned exclusively by a user and is not associated with any book, then that record is not visible through the book visibility. To further illustrate the record ownership mode, consider the example in the following table.

Account Record	Record Ownership	Book Association	Description
Action Rentals	User (Lucy Harris)	None	Action Rentals is owned by Lucy Harris and is not associated with any book.
Bobcat Corp.	Book (West)	West	Bobcat Corp. is owned by the West book, and so West becomes the primary book.
Coastal Company	User (Lucy Harris)	West	Coastal Company is owned by Lucy Harris and is associated with the West book in the child applet.

Results

The following records appear in Manager, Team, and Full visibility modes for Lucy Harris because these records are owned by her or shared by her:

- Action Rentals
- Coastal Company

The Bobcat Corp. record does not appear in these modes because this record is exclusively owned by West book. The following records appear when West book is selected from the book selector because these records are either owned by or associated with West book:

- Bobcat Corp.
- Coastal Company

The Action Rentals record does not appear in the Book visibility mode because this record is exclusively owned by the user, Lucy Harris. For more information, see About Data Access, Record Sharing, and Record Ownership (on page 47) and About Record Ownership Modes (on page 1428).

User Delegation

The User Delegation feature allows further control of which data displays in reports. Using the Book selector, you can view data from any user who has added you to their Delegated User list. You can select the user's name from the Book selector to see report data for that user. You no longer display your own data in the report, but only the data of the selected user. However, your Analytics Visibility setting is still in effect. For example, if Ryan added you to his delegated user list, and his Analytics Visibility setting is Manager Visibility, you do not necessarily display the same data in the report that Ryan does unless Manager Visibility is also your setting.

Role-Based Can Read All Records Setting

This control is present in both the company profile and user profiles. This control determines whether Analytics takes into account a role's setting for Can Read All Records for record types. When this control is set to Yes in the company profile or set to Yes or Null in a user's profile, and also any record type has the Can Read All Records flag checked, then a user can display all records for that record type in reports. When these conditions are not met, Analytics enforces the default visibility settings that are defined in the Reporting and Analytics subject areas.

If Role-Based Can Read All Records is enabled for a user, then Analytics ignores the visibility setting on the record types checked with Can Read All Records in the role definition. For other record types, Analytics enforces visibility, which is based on the default visibility settings for reporting and historical subject areas. For example, if Role-Based Can Read All Records is enabled for your profile, your visibility setting for the reporting subject areas is set to Manager Visibility, and Can Read All Records is set for Opportunity but not for Contact record types, then all opportunities are displayed when you run a report, but only for contacts owned by you and your subordinates.

Companies and company administrators must be aware of the following considerations when using the Role-Based Can Read All Records type setting in Analytics:

- Role-based record type visibility overrides Book visibility. When you select a book in the Book Selector with the role-based record type visibility enabled and the Can Read All Records setting defined on a record type for your role, all records for that record type are displayed, not just those contained in that book.
- Role-based record type visibility overrides the user hierarchy and user delegation aspects of visibility in Analytics. When you select a user in the Book Selector with role-based record type visibility enabled and the Can Read All Records setting defined on a record type for your role, all records of that record type are displayed, not just those that you expect to see for the selected user.
- In reports with two or more record types, the visibility to records is based on the record type with the most restrictive visibility control. For example, if the role-based record type visibility is enabled on the contact record type, but not on the opportunity record type and when both record types are on the report, Analytics shows only the opportunities the user has access to and their associated contacts.
- Access to user quota is always based on the manager visibility in both real time and in historical subject areas. Role-based record type visibility does not affect this behavior.

Security and Data Visibility in Historical Analytics and Real-Time Reporting Subject Areas

The data seen in reports is based on the security and data visibility defined for record types and the default visibility settings defined for the historical analytics and real-time reporting subject areas. Most record types are secured in every subject area, but there are exceptions to this rule to support the reporting needs of associated record types even when these associated record types are not explicitly shared or owned by a user. For example, the account record type is secured only in subject areas where account is the primary driving record type but is unrestricted in the remaining subject areas.

The purpose for keeping a record type unrestricted in a subject area is that it allows you to report on the associations between record types. For example, in the Lead Historical Analytics subject area you can report on leads that are owned or shared by you and those leads' corresponding accounts even where those associated accounts are not owned or shared by you.

The following table details the visibility of record types in the historical analytics subject areas.

Record type	Subject Area	Manager Visibility	Team Visibility	Full Visibility
Account	Account Address	Secured	Secured	Secured
	Account Competitor History	Secured	Secured	Secured
	Account and Partner History	Secured	Secured	Secured
	Account and Related Account History	Secured	Secured	Secured
	Account Contact History	Secured	Secured	Secured
	Account Hierarchy	Secured	Secured	Secured
	Account History	Secured	Secured	Secured

Record type	Subject Area	Manager Visibility	Team Visibility	Full Visibility
	Account Team History	Secured based on team visibility	Secured based on team visibility	Secured
	Other subject areas	Unrestricted	Unrestricted	Unrestricted
Account Competitor	All	Unrestricted	Unrestricted	Unrestricted
Account Partner	All	Unrestricted	Unrestricted	Unrestricted
Account Related Account	All	Unrestricted	Unrestricted	Unrestricted
Account Revenue	All	Secured	Unrestricted	Unrestricted
Activity	All	Secured	Secured	Secured
Asset	All	Secured	Secured	Secured
Call Activity	All	Secured	Secured	Secured
Campaign	All	Unrestricted	Unrestricted	Unrestricted
Contact	Contact Team History	Secured based on team visibility	Secured based on team visibility	Secured
	Other subject areas	Secured	Secured	Secured
Contact Interests	All	Secured	Secured	Secured
Contact Revenue	All	Secured	Secured	Secured
Custom Objects 01-05	All	Secured	Secured	Secured
Dealer	Dealer History	Secured	Secured	Secured
	Other subject areas	Unrestricted	Unrestricted	Unrestricted
Event	All	Secured	Secured	Secured

Record type	Subject Area	Manager Visibility	Team Visibility	Full Visibility
Household	All	Secured	Secured	Secured
Lead	Lead Team History	Secured based on team visibility	Secured based on team visibility	Secured
	Other subject areas	Secured	Secured	Secured
Messaging Plan	Personalized Content Delivery History	Secured based on manager visibility	Secured based on manager visibility	Secured based on manager visibility
Messaging Plan Item	Personalized Content Delivery History	Secured based on manager visibility	Secured based on manager visibility	Secured based on manager visibility
Message Response	Personalized Content Delivery History	Secured based on manager visibility	Secured based on manager visibility	Secured based on manager visibility
Opportunity	Opportunity Team History	Secured based on team visibility	Secured based on team visibility	Secured
	Other subject areas	Secured	Secured	Secured
Opportunity Competitor	All	Unrestricted	Unrestricted	Unrestricted
Opportunity Partner	All	Unrestricted	Unrestricted	Unrestricted
Partner	All	Secured	Secured	Secured
Portfolio	All	Secured	Secured	Secured
Product Revenue	All	Secured	Secured based on the opportunity record type of the product revenues	Secured based on the opportunity record type for manager visibility and based on the opportunity record type of the product revenues for team visibility
Quota	All	Secured based on manager visibility	Secured based on manager visibility	Secured based on manager visibility
Relationship Contact	All	Unrestricted	Unrestricted	Unrestricted

Record type	Subject Area	Manager Visibility	Team Visibility	Full Visibility
Service Request	Service Request Team History	Secured based on team visibility	Secured based on team visibility	Secured
	Other subject areas	Secured	Secured	Secured
Shared Address	All	Unrestricted	Unrestricted	Unrestricted
Solutions	All	Only solution records created by the user and subordinates.	Only solution records created by the user.	Only solution records created by the user and subordinates.
User	All	Unrestricted	Unrestricted	Unrestricted

The following table details the visibility of record types in the real-time reporting subject areas.

Record type	Subject Area	Manager Visibility	Team Visibility
Account	Accounts	Secured	Secured
	Accounts and Competitors	Secured	Secured
	Accounts and Partners	Secured	Secured
	Accounts and Related Accounts	Secured	Secured
	Account Contacts	Secured	Secured
	Account Team	Secured based on team visibility	Secured based on team visibility
	Custom Objects 1,2,3 and Accounts	Secured	Secured
	Other subject areas	Unrestricted	Unrestricted
Account Competitor	All	Unrestricted	Unrestricted
Account Partner	All	Unrestricted	Unrestricted
Account Related Account	All	Unrestricted	Unrestricted

Record type	Subject Area	Manager Visibility	Team Visibility
Activity	Shared Activities	Secured based on team visibility	Secured based on team visibility
	Other subject areas	Secured	Secured
Asset	All	Secured	Secured
Campaign	All	Unrestricted	Unrestricted
Contact	Contact Team	Secured based on team visibility	Secured based on team visibility
	Other subject areas	Secured	Secured
Custom Objects 01-40	All	Secured	Secured
Dealer	All	Unrestricted	Unrestricted
Household	All	Secured	Secured
Lead	Lead Team	Secured based on team visibility	Secured based on team visibility
	Other subject areas	Secured	Secured
Messaging Plan	Personalized Content Delivery	Secured based on manager visibility	Secured based on manager visibility
Messaging Plan Item	Personalized Content Delivery	Secured based on manager visibility	Secured based on manager visibility
Message Response	Personalized Content Delivery	Secured based on manager visibility	Secured based on manager visibility
Opportunity	Opportunity Team	Secured based on team visibility	Secured based on team visibility
	Other subject areas	Secured	Secured
Opportunity Competitor	All	Unrestricted	Unrestricted
Opportunity Partner	All	Unrestricted	Unrestricted

Record type	Subject Area	Manager Visibility	Team Visibility
Partner	All	Secured	Secured
Product Revenue	All	Secured	Secured based on the opportunity record type of the product revenues
Quota	All	Secured based on manager visibility	Secured based on manager visibility
Relationship Contact	All	Unrestricted	Unrestricted
Service Request	Service Request Team	Secured based on team visibility	Secured based on team visibility
	Other subject areas	Secured	Secured
Solutions	All	Only solution records created by the user and subordinates.	Only solution records created by the user.
User	All	Unrestricted	Unrestricted
Vehicle	All	Only vehicle records created by the user and subordinates.	Only vehicle records created by the user.

Notes:

1. Role-based record type visibility is enabled on all record types.

2. Book visibility in Analytics is enabled for the following record types: Account, Activity, Asset, Contact, Event, Household, Lead, Opportunity, Product Revenue, Service Request, Solutions, and Custom Objects 01 to 40. The Book visibility in reporting subject areas shows records in the current book, but in historical analytics subject areas it shows records contained in the subbooks as well.

3. Unlike the record types where Book visibility is respected, reporting with the Book folder on a record type that is unrestricted returns all records that have a primary book associated with them, even if that primary book is not the book that is selected in the Book selector. For example, access to campaign records is unrestricted, so reporting on the Campaign record type with the Book folder returns all of the campaign records that have a primary book associated with them.

4. Visibility control is not applied to Account metrics when the query involves only Account metrics. To enable visibility control, include a field from the Account dimension.

About Custom Fiscal Calendar in Analytics

Analytics supports multiple forms of calendar options:

- **Calendar Quarter.** A fiscal calendar type where the fiscal year can start on any day and month. Each fiscal year of 12 months consists of four quarters of three months each. Each month is a whole month and starts and ends on the same date.
- **5-4-4 Model.** A fiscal calendar type where the fiscal year can start on any day and month. Each fiscal year of 12 months consists of four quarters of three months each. The first month is 5 weeks long, and the second and third months are 4 weeks long.
- **4-4-5 Model.** A fiscal calendar type where the fiscal year can start on any day and month. Each fiscal year of 12 months consists of four quarters of three months each. The first and second months are 4 weeks long, and the third month is 5 weeks long.
- **Custom Fiscal Calendar.** A fiscal calendar type with unique start and end dates for each year. It also allows a company to uniquely handle years that have a fifty-third week or leap week.

The date dimension is generated already for 41 years (2000 to 2040) for all calendar types except the custom fiscal calendar type. Hence, companies defined with calendar quarter, 4-4-5 or 5-4-4 calendar type can analyze their fiscal metrics for data with dates that fall within this range (2000 to 2040). Analyzing data by fiscal and calendar periods when accessed or joined through date dimensions that are outside this range is not possible.

For companies on a custom fiscal calendar, they can analyze the fiscal metrics through the date dimension only for the years defined in Oracle CRM On Demand. For example, if you define your fiscal calendar for the years 2000 to 2010, then you can analyze the fiscal metrics for these 11 years only. If a record is created or started or ended on a date that is outside this range, that record is still visible in Analytics reports as long as it is not accessed or joined through the date dimension table.

You must be familiar with the following considerations when your company is using a custom fiscal calendar:

- If your company changes the fiscal calendar type from a standard or regular fiscal calendar (calendar quarter, 4-4-5, 5-4-4 models) to a custom fiscal calendar, the change is not immediate. Your company must request a full ETL (Extract, Transform, and Load) for the change to be complete.
- If your company changes the fiscal calendar from a standard or regular fiscal calendar to a custom fiscal calendar, it is not possible to analyze the historical pipeline snapshots in Analytics for the fiscal years that were not defined in the custom fiscal calendar. Historical snapshots cannot be aligned with the new calendar definition.
- If your company changes the custom fiscal calendar definition for an existing year, this change is not reflected until a full ETL is performed.
- The custom fiscal calendar definition for new companies as well as calendar definitions of new fiscal years for existing companies are processed during the nightly refresh.
- The fiscal calendar code field in the date dimension can be used to decode the fiscal calendar definition for companies on a standard calendar or regular fiscal calendar. However, for companies using a custom fiscal calendar this code cannot be guaranteed to be consistent and therefore it cannot be reliably decoded.
- Companies that choose to use a custom fiscal calendar must enter fiscal calendar definitions, starting from the earliest year available and proceed sequentially without any gap in the fiscal year definitions. If you want to define calendar definitions for earlier years, you can do so, but you must request a full ETL.

Getting Started with Analytics

NOTE: To create custom analyses your user role must include the Manage Custom Reports privilege or the Manage Personal Reports privilege.

There are two types of subject areas that you can use in a custom analysis: the Historical Analytics subject areas and the Real-time Reporting subject areas. Most analyses use data from a single subject area. It is possible to create an analysis using data from two subject areas, but it is an advanced task.

Each subject area contains data fields (organized into dimensions) and their related metrics.

The Historical Analytics subject areas use data that is compiled nightly. These subject areas generally have historical or trend data, or contain more complex calculations than those found in the Real-time Reporting subject areas. If this is the first time you have signed in, the Historical Analytics subject areas do not show data until the first ETL run has completed.

The Real-time Reporting subject areas provide real-time analyses. The data in these analyses can change during the working day. To update the analysis in real time, click the Refresh icon in the icon bar in the Results tab or click the Refresh link after opening an analysis. For more information about subject areas, see Selecting Subject Areas (on page 826).

After you create a new analysis, the process of setting up a custom analysis consists of these tasks:

1. Step 1: Defining Criteria in Analytics (on page 975)

   Set up columns and filters. Add filters to determine which data to include (optional but recommended). Filters restrict the data that is displayed, reducing the size of the data set and avoiding performance issues.
2. Step 2: Reviewing Results and Creating Layouts (on page 1000)

   Add views to include graphical or alternative representations of the data.
3. Step 3: Defining Analytics Prompts (Optional) (on page 1042)

   Add prompts that allow users to specify filter values when they run the report.
4. Step 4: Saving Analyses (on page 1046)

   Save the analysis.

Creating a New Custom Analysis

The following procedure describes how to create a new analysis.

Before you begin. Do the following:

- Be familiar with the limitations of analyses and reporting record types. For more information, see About Limitations in Analytics (on page 817).
- Review the information about custom analyses. If you have added new fields, you can use those custom fields on an analysis. If you have changed the display names for fields, the new display names are used for the analyses.

  NOTE: If you selected the option to add new picklist values when importing data, those new picklist values might not be displayed in the reports until the next ETL run completes. Therefore, you might not be able to use the new picklist values as filters during that time period.

  NOTE: Custom related information fields are not exposed in Analytics. You should instead use the original fields that are referred to by the custom related information fields for reporting.

To create a custom analysis

1. Click the Analytics tab.
2. On the Home page, under the Create pane, click Analysis.
3. Click a Historical Analytics subject area or a Real-time Reporting subject area.

Related Topics

- Selecting Subject Areas (on page 826)

About Limitations in Analytics

The limitations of reports are listed in the following sections.

Description Text Limits

The number of characters that can appear in the Description Extended field in a report is limited to a maximum of 1,999. However, in some cases, the limit is 1,000 characters. Oracle CRM On Demand determines how many characters can appear by calculating the number of bytes that are needed to store the first 1,999 characters of the text. Some characters require more than one byte of storage, for example, certain characters in the Chinese language. If the number of bytes required to store the first 1,999 characters is more than 4,000, then only the first 1,000 characters can appear. If the number of bytes required to store the first 1,999 characters is less than 4,000, then the first 1,999 characters can appear.

For other Description fields, the maximum number of characters that can appear is also limited. The limit for these fields can be 255 characters, 1,000 characters, or 1,999 characters, depending on the field and the record type.

Maximum Number of Records

The maximum number of records that can appear is as follows:

- **Table view.** For this view, the maximum size for an analysis is 700,000 rows (maximum of 10,000 rows displayed at a time). If you attempt to display more than 700,000 rows, then Oracle CRM On Demand displays an error message about exceeding the maximum number of records. When downloading using the Excel, CSV, or Tab Delimited options under the Data export options, the maximum number of rows that can be downloaded is 700,000. When downloading using any other option (PDF, Excel, Powerpoint, or Web Archive (Mime HTML) under the Export options, or the XML option under the Data options), the maximum number of rows that can be downloaded is 65,000.
- **Drop-down lists.** The maximum number of values that can show in drop-down lists is 1,000. This number includes the drop-down lists in filter conditions and report prompts, dashboard prompts, table view prompts, pivot table view prompts, and graph view prompts.

Drop Target Limits

The Layout pane in a view editor can contain one or more drop targets, depending on the view type. A drop target is an area where you place one or more columns to specify the position and purpose of the columns in the layout. The columns that you place in the Sections drop target divide a view into sections based on the different values in the columns. The following table shows the maximum number of sections that you can have for each type of view.

View Type	Maximum Number of Sections
Table	1000
Graph	25
Pivot Table	1000
Treemap	50
Simple Trellis	10
Advanced Trellis	25

Pivot Table View Limits

The following limits apply to Pivot Table views:

- The maximum number of cells that can be displayed is 750,000. If this limit is exceeded at runtime, then an error message is displayed. In addition, the user who is running the analysis cannot export the results.
- The maximum number of records that can be returned by a query for processing is 40,000, and the maximum number of cells that can be populated is 150,000. If one or both of these limits are exceeded at runtime, then an error message is displayed.
- Depending on the option that was selected from the Data Viewing options in the Pivot Table properties, an error might be returned at runtime if a column that was added to the Columns drop target for the Pivot Table

view returns more than 1,000 values. If the Content paging option was selected, then an error is returned and the user who is running the analysis cannot view or export the analysis. If the Fixed headers with scrolling content option was selected, then an error is not returned. The user who is running the analysis can scroll to view all of the content in the analysis. However, if the user wants to export the analysis, then the user must select one of the Data export options (Excel, CSV, Tab Delimited, or XML). If the user selects any other option, then the export file is empty.

Catalog Page Display Limit

The maximum number of objects that can be displayed in the Catalog page is 300, although more than this number of objects can exist in the catalog. If an object is not displayed on the Catalog page, then you can use the search functionality to find the object. In addition, you can save objects in folders and subfolders, to make the objects easier to locate. You can save all types of objects, including dashboards, in folders and subfolders.

Time Limit for Query Execution

Analytics provides optimal performance for queries and reports while balancing the performance of Oracle CRM On Demand. To minimize the negative effect of long-running queries or run-away queries on the overall performance of Analytics, a time limit has been enabled for both real-time and historical reports. Queries that exceed the time limit generate a Timeout error message. For information about specific timeout limits that are applicable to your instance of Oracle CRM On Demand, contact Customer Care. For all instances, the maximum query time cannot exceed 10 minutes for Real-Time Reporting subject areas and 180 minutes for Historical Analytics subject areas. For information on optimizing query execution time, see About Report Performance (on page 1082) and Optimizing Performance (on page 1083).

Multiselect Picklists

In Historical Analytics subject areas, Analytics displays a multiselect picklist (MSP) field (up to 10 fields for each object) as a separate folder. Within these folders only the first 20 picklist values of the field and the concatenated MSP field value are available for reporting.

Analytics supports the display of the concatenated MSP field values in the company’s default language. Analytics also displays two additional folders:

- **Language Independent Code (LIC) folder**: This folder exposes the MSP concatenated field values using the language independent codes (LIC) as stored internally in the database. Use these MSP values in filters for optimum performance. LIC folders are named with the object name and suffixed with the word *(Code).* For example, Account Multi-Select Picklist Fields (Code) and Activity Multi-Select Picklist Fields (Code).
- **User Language folder:** This folder exposes concatenated MSP field values in the user’s default language. User Language folders are named with the object name and suffixed with the words *(User Language).* For example, Account Multi-Select Picklist Fields (User Language) and Activity Multi-Select Picklist Fields (User Language).

Multiselect picklist values are supported in the Historical Analytics and Real-time Reporting subject areas for the following objects:

- Account
- Activity
- Approver
- Asset
- Associated Contact
- Associated Opportunity
- Call Activity
- Campaign
- Contact
- Custom Object 01, 02
- End Customer

- Event
- Final Approver
- Household
- Institution
- Invitees
- Last Approved By
- Lead
- Opportunity
- Opportunity Product Revenue
- Owned By User
- Primary Contact
- Product
- Quota
- Quote
- Sample Request
- Service Request
- Shared Address
- Solution
- User
- User Sign In History

Column Filter Prompt in Combined Analyses

Column filter prompts provide general filtering of a column within a request. However, this column filter prompt is not available in combined analysis requests.

Book Visibility

The Book selector appears in the Reports and Dashboard pages and in reports embedded in record Homepages. You can use the Book selector to drill down into user books or custom books. If you have Full Visibility settings and are displaying an Historical Analytics subject area, you can exclude subordinates or subbooks in the respective book hierarchy by clearing the Include Sub-Items check box.

The Book selector is not available for report previews. You cannot exclude sub-items from reports made from Real-time Reporting subject areas. You can clear the Include Sub-Items check box, but it has no effect on Real-time Reporting subject areas, it only affects Historical Analytics subject areas.

NOTE: Several settings control your visibility to records in analytics. For more information, see About Visibility to Records in Analytics (on page 807).

Exchange Rates

If your company has more than one active currency, your company administrator must set up exchange rates for each currency. Changes made to exchange rates appear in reports after the nightly refresh of analytics data. A single exchange rate is determined for each month, and all transactions within the month use that rate.

Some record types have multiple date fields. Only one date field is used to determine the month's exchange rate. For asset currency conversions, the Purchase Date field determines the month used. For an opportunity, the Opportunity Close Date that is closest to the Exchange Rate Effective Date is used.

Localization Settings

If you change your default language, the reporting elements display in the newly selected language. However, the data in reports or dashboards depends on your company's default language regardless of your chosen language.

Date Support

Analytics supports date analysis of metrics through the date dimension for 41 years (2000 to 2040) for companies using calendar-quarter or standard, fiscal-calendar models. For companies using custom fiscal calendar, Analytics can support date analysis of metrics only for the years defined in Oracle CRM On Demand.

The exchange rate table supports only dates ranging from the year 2000 to the year 2040. If an analysis includes fields from more than one folder, then Oracle CRM On Demand might perform table joins that include the exchange rate table. In this situation, if a date is outside the range that is supported by the exchange rate table, then the record will be excluded from the results.

Date dimensions are set up differently in Historical Analytics subject areas than in Real-time Reporting subject areas. In Historical Analytics subject areas there is only one date dimension (standard or canonical), and there might be one or multiple sets of metrics using different dates, so these metrics can be reported by any date within the desire range. In Real-time Reporting subject areas, there are one or multiple date dimensions (role-playing) and only a single set of metrics, so these metrics can be analyzed using different date dimensions.

For example, consider the Opportunity History Analytics subject area, which contains one date dimension (Close Date) and two sets of metrics. The default set of metrics, Opportunity Metrics, is based on the Close Date, but there is also another set of metrics, Opportunity Metrics by Open Date, to allow analysis of opportunities by an open date. However, the Opportunities Real-time Reporting subject area contains two date dimensions: Date Opened and Close Date, and one set of metrics (Opportunity Metrics). The advantage of using the date dimension of the Historical Analytics subject area is that it allows analysis of various related metrics for the entire period using any date within the desire range in a single report.

The following table summarizes the set up of the date dimensions between Historical Analytics and Real-time Reporting subject areas.

Characteristic	Historical Analytics Subject Areas	Real-time Reporting Subject Areas
Date dimensions	One	One or multiple
Sets of metrics	One or multiple	One

Time Support

Dates and times shown in reports are displayed in the company's time zone, so that everyone using the report can view consistent data. It is possible to display dates and times in the user's time zone (for Real-time Reporting subject areas only) if the company administrator has enabled the User Time Zone Support for Reporting Subject Areas field and if this field is selected in the user's profile. Changing this setting affects only reports that you display and does not affect reports that other users display. When sharing reports, the date and time information that you see might be different from the information that others see.

User Quotas

User quotas are available for reporting in the following subject areas: Activities, Activity History, Opportunities, Opportunity History, Opportunity-Products, and Opportunity-Product History. You must be familiar with the following considerations when reporting user quotas:

- User quotas are related to your fiscal calendar definitions. If your fiscal calendar year uses 12 periods starting every July 1, then so does the user quotas. In reports, the user quota year is determined by the final period in the fiscal year. For example, if your fiscal year ends on June 30, 2011, then the user quota year 2011 is from July 1, 2010 through June 30, 2011.
- If your company changes the fiscal calendar definition, then you must delete and recreate user quotas if the quarterly and yearly roll-up of quota values for users must match the user quotas for Analytics. However, the user quota relation with the fiscal year in Analytics is still based on the year in which the last period of the fiscal year ends.

- User quotas are defined for the quota name, date (month or higher), and user. They are not defined at the opportunity level. If you try to report quota metrics and opportunity metrics with the opportunity dimension field, you might encounter ODBC errors. You might also encounter ODBC errors when the user quota is reported at a level of the dimension object that is lower than the defined level or the available level. For example, user quotas are defined at the month level. If you try to report at the date level, you might encounter an ODBC error.
- User quota metrics are always generated using Manager visibility regardless of the user's visibility. Hence, it is not possible for users who are not company administrators to report user quotas along with opportunity metrics when their visibility is set to Team visibility.
- You might experience ODBC errors if you report user quota metrics with a nonconforming dimension. For example, user quota metrics are not defined at the opportunity dimension in the Opportunity History subject area, and hence, you might experience ODBC errors if you tried to report user quota and opportunity metrics along with the opportunity dimension fields.
- If you define more than one quota for a given year, the user quota values shown in reports is an aggregation of all quota types for that year. You must use the filter by metric feature if you want the report to show user quota values of selected quota types for that year. For example, if Service Quota and License Quota are two quota types for the fiscal year 2009, and you want only Service Quota to be displayed in reports when reporting opportunity revenue, then use the following filter-metric formula on the user quota value column:

  ```
  FILTER("Quota Metric"."QUOTA VALUE" USING (Quota."QUOTA NAME" = 'Service
  Quota'))
  ```

Custom Objects 01, 02, and 03 Associations

You cannot report on the many-to-many associations between Custom Objects 01, 02, and 03 with the following objects in Analytics:

- Activities
- Assets
- Leads
- Products

The many-to-many relationship is implemented only for Custom Objects 01, 02, and 03 and Account, Contact, Service Request, and Opportunity in Analytics. This many-to-many relationship is yet to be implemented between Custom Objects 01, 02, and 03 and Activities, Assets, Leads, and Products. However, you can report on the one-to-many relationship between these objects and Custom Objects 01, 02, and 03, using the Advanced Custom Objects real-time reporting subject area. You can display elements from the Activities dimension if you include an Activity metric in the report.

Currency Conversion Limits

If a currency value is entered using a currency that is not the company's default currency, then Analytics converts that value to the company's default currency for use in reports. Large values that are acceptable for input in one currency may exceed value limits when converted to the company default currency. When this occurs, the report generation cannot be completed.

Related Topic

- About Custom Objects Reporting (on page 822)

About Custom Objects Reporting

Analytics provides comprehensive support for reporting custom objects, as follows:

- You can report on Custom Objects 01, 02, and 03 and their many-to-many relationship with accounts, contacts, opportunities, and service requests through the following specially dedicated subject areas:
  - Custom Objects and Accounts Real-Time Reporting Subject Area (on page 935)
  - Custom Objects and Contacts Real-Time Reporting Subject Area (on page 936)

- Custom Objects and Opportunities Real-Time Reporting Subject Area (on page 937)
- Custom Objects and Service Requests Real-Time Reporting Subject Area (on page 938)

- You can use the Advanced Custom Objects Real-Time Reporting Subject Area (on page 914) to report on the relationship between Custom Objects 04 through 40 and many other record types, including Custom Objects 01, 02, and 03.
- You can use the Advanced Custom Objects Historical Analytics Subject Area (on page 844) to report on the relationships between Custom Objects 01 through 05 and accounts, activities, campaigns, contacts, leads, opportunities, partners, and service requests.

About Using Addresses in Reports

Many reports require the use of address fields. In Oracle CRM On Demand, you can generate reports about addresses in two different ways, depending on your needs. In the Active Subject Area, an address folder with the word Extended in it (for example, Billing Address - Extended) provides reporting on all nine standard address fields included with Oracle CRM On Demand. For details on how each field maps to the address format for specific countries, see About Countries and Address Mapping (on page 1615).

Fields included from the address Extended folder are not drillable in reports. Field labels display consistently regardless of the country for each record or the user's default, company country in Oracle CRM On Demand.

Most of the other address fields in the Active Subject Area (those not in the Extended folder) are drillable when included in reports. The fields displayed match those fields associated with the user's default, company country in Oracle CRM On Demand. However, all fields might not appear if the country associated with a specific record is not the same as the user's default, company country in Oracle CRM On Demand.

Language Support for Picklists in Analytics

Analytics supports the display of picklist values in your user language in addition to the company's default language. The following table lists the record types that support these picklists and the name of the picklist subfolders. Each subfolder contains a set of picklist fields that you can use to display the picklist values in your user language.

Record Type	Historical or Real-Time	Subfolder Name
Account	Historical and Real-Time	Account Picklist Fields (User Language)
Account Relationship	Historical and Real-Time	Account Relationship Picklist Fields (User Language)
Activity	Historical and Real-Time	Activity Picklist Fields (User Language)
Assessment	Real-Time	Assessment Picklist Fields (User Language)
Asset	Historical and Real-Time	Asset Picklist Fields (User Language)
Business Plan	Real-Time	Business Plan Picklist Fields (User Language)

Record Type	Historical or Real-Time	Subfolder Name
Campaign	Historical and Real-Time	Campaign Picklist Fields (User Language)
Contact	Historical and Real-Time	Contact Picklist Fields (User Language)
Custom Object 01 - 05	Historical and Real-Time	Custom Object nn Picklist Fields (User Language)
Custom Object 06 - 40	Real-Time	Custom Object nn Picklist Fields (User Language)
Event	Historical	Event Picklist Fields (User Language)
Financial Plan	Real-Time	Financial Plan Picklist Fields (User Language)
Household	Historical and Real-Time	Household Picklist Fields (User Language)
Lead	Historical and Real-Time	Lead Picklist Fields (User Language)
Message Response	Historical and Real-Time	Message Response Picklist Fields (User Language)
Messaging Plan	Historical and Real-Time	Messaging Plan Picklist Fields (User Language)
Messaging Plan Item	Historical and Real-Time	Messaging Plan Item Picklist Fields (User Language)
Opportunity	Historical and Real-Time	Opportunity Picklist Fields (User Language)
Opportunity Product	Historical and Real-Time	Opportunity Product Picklist Fields (User Language)
Order	Real-Time	Order Picklist Fields (User Language)
Product	Historical and Real-Time	Product Picklist Fields (User Language)
Quota	Historical and Real-Time	Quota Picklist Fields (User Language)

Record Type	Historical or Real-Time	Subfolder Name
Service Request	Historical and Real-Time	Service Request Picklist Fields (User Language)
Shared Address	Historical	Shared Address Picklist Fields (User Language)
Solution	Historical and Real-Time	Solution Picklist Fields (User Language)
User	Historical and Real-Time	User Picklist Fields (User Language)

NOTE: The User record type does not always appear as the User dimension. Other dimension names used for the User record type are Approver, Final Approver, and Last Approved By. If a user record type is contained within another record type, then the user record type appears in the second level of the hierarchy as you would expect. However, the user-language picklist and the company picklist also appear in the second level of the hierarchy, not under the user record type.

To display the picklist values in the company language, you can continue to use the picklist fields that are under the standard dimension folders. Also the picklist fields, suffixed with the term *Code,* that were previously available under the main folder are now available under the subfolders (such as Account Picklist Fields (Code), Activity Picklist Fields (Code), and so on) with the suffix removed from the field names. You can continue to use these language independent code (LIC) fields and the optimized version of the base picklist fields in report filters to improve query performance.

In reports, picklist values appear in the user or company selected language. However, picklist fields that do not have a value selected in the user interface are displayed as shown in the following table. The behavior of the picklist value display depends on the type of picklist, which can be prebuilt or indexed custom.

The following table describes the behavior of the picklist value display for Historical Analytics subject areas.

Type of Picklist	Language Independent Code	Company Language Dependent Value	User Language Dependent Value
Prebuilt	Unspecified	Unspecified or Blank. If the value is set to Unspecified, then this text appears in the company selected language.	Unspecified. This text appears in the user selected language.
Indexed custom with or without custom values defined	Unspecified	Blank.	Unspecified. This text appears in the user selected language.

The following table describes the behavior of the picklist value display for Real-time Reporting subject areas.

Type of Picklist	Language Independent Code	Company Language Dependent Value	User Language Dependent Value
Prebuilt	Blank	Unspecified. This text appears in the company selected language.	Unspecified. This text appears in the user selected language.
Indexed custom with custom values defined	Blank	Unspecified. This text appears in the company selected language.	Unspecified. This text appears in the user selected language.
Indexed Custom with no custom values defined	Blank	Records are deleted.	Unspecified. This text appears in the user selected language.

Usage Notes on Subject Areas

This topic provides information about date and time subject areas, and quota periods.

Date and Time Subject Areas

Periods in your reports might be based on your company's fiscal calendar, which might differ from a standard calendar. For example, your company's fiscal year might begin on 1 June of each calendar year. If your company has recently changed its fiscal calendar year method in Oracle CRM On Demand, then review carefully historical analyses if they span multiple years. Data in reports based on your previous fiscal calendar method cannot be aligned with data using a new fiscal calendar method.

Quota Periods

Reports that include quota information by year use the closing month of the year. Whereas on the Quota screen, the year shows the starting month of the quota period, which is different from reports. For example, if the quota period runs from November 2009 to January 2010, then the Quota screen shows the year as 2009, but the reports show the year as 2010.

Selecting Subject Areas

To select a subject area for a report, click the Analytics tab and then click Analysis in the Create pane.

The Select Subject Area page contains two categories of subject areas: Historical Analytics and Real-time Reporting. The subject areas in the Historical Analytics category generate reports that are historical and that show trend analyses, based on data that is refreshed nightly. The subject areas in the Real-time Reporting category provide up-to-the-second data analyses and real-time information.

Subject areas represent information pertinent to a particular area of the business, or the reporting and analysis needs of a particular audience. Subject area names correspond to the type of information that they contain, such as dimension objects (record types) and fact metrics, which the business users want to analyze. Subject area names organize and categorize this information in various folders.

Historical Analytics Subject Areas

The following links provide detailed information on each subject area, including its business purpose, its relationship type (one-to-one, one-to-many, many-to-many, and so on), and a listing of the dimensions and metrics that are available:

- Account Addresses Historical Analytics Subject Area (on page 831)
- Account and Competitor Historical Analytics Subject Area (on page 832)
- Account and Partner Historical Analytics Subject Area (on page 834)
- Account and Related Account Historical Analytics Subject Area (on page 836)
- Account Contact Historical Analytics Subject Area (on page 838)
- Account Hierarchy Historical Analytics Subject Area (on page 839)
- Account Historical Analytics Subject Area (on page 840)
- Account Team Historical Analytics Subject Area (on page 841)
- Activity Historical Analytics Subject Area (on page 842)
- Advanced Custom Objects Historical Analytics Subject Area (on page 844)
- Asset Historical Analytics Subject Area (on page 852)
- Call Activity Historical Analytics Subject Area (on page 853)
- Campaign Historical Analytics Subject Area (on page 855)
- Campaign Response Historical Analytics Subject Area (on page 856)
- Contact Addresses Historical Analytics Subject Area (on page 857)
- Contact Historical Analytics Subject Area (on page 858)
- Contact Interests Historical Analytics Subject Area (on page 858)
- Contact Revenue Historical Analytics Subject Area (on page 859)
- Contact Team Historical Analytics Subject Area (on page 860)
- Deal Registration Historical Analytics Subject Area (on page 861) (Oracle CRM On Demand Partner Relationship Management Edition only)
- Deal Registration Product Revenue Historical Analytics Subject Area (on page 862) (Oracle CRM On Demand Partner Relationship Management Edition only)
- Dealer Historical Analytics Subject Area (on page 864) (Oracle CRM On Demand Automotive Edition only)
- Event Historical Analytics Subject Area (on page 865)
- Household Historical Analytics Subject Area (on page 866) (Oracle CRM On Demand Financial Services Edition only)
- Lead Historical Analytics Subject Area (on page 868)
- Lead Team Historical Analytics Subject Area (on page 869)
- MDF Request Historical Analytics Subject Area (on page 870) (Oracle CRM On Demand Partner Relationship Management Edition only)
- Opportunity and Competitor Historical Analytics Subject Area (on page 872)
- Opportunity and Partner Historical Analytics Subject Area (on page 874)
- Opportunity Contact Historical Analytics Subject Area (on page 875)
- Opportunity Historical Analytics Subject Area (on page 876)
- Opportunity Product Revenue Historical Analytics Subject Area (on page 878)
- Opportunity Team Historical Analytics Subject Area (on page 879)
- Partner Historical Analytics Subject Area (on page 879) (Oracle CRM On Demand Partner Relationship Management Edition only)
- Personalized Content Delivery Historical Analytics Subject Area (on page 880)
- Pipeline Historical Analytics Subject Area (on page 883)
- Portfolio Historical Analytics Subject Area (on page 884) (Oracle CRM On Demand Financial Services Edition only)
- Product Historical Analytics Subject Area (on page 885)
- Quote Historical Analytics Subject Area (on page 886)
- Sales Stage Historical Analytics Subject Area (on page 887)
- Service Request Historical Analytics Subject Area (on page 888)

Real-time Reporting Subject Areas

The following links provide detailed information on each subject area, including its business purpose, its relationship type (one-to-one, one-to-many, many-to-many, and so on), and a listing of the dimensions and metrics that are available:

The following table shows the five types of subject areas that Analytics uses.

Subject Area Type	Description
Simple	This subject area type consists of a single fact table that contains all the metrics of the driving record type. The report always provides a result that can be understood. In other words, whatever combination of attributes and metrics you select for your report, the report always returns a result that reflects the data in Oracle CRM On Demand. Simple subject areas are appropriate when you want to report on a single set of metrics. They allow you to drill down on the detail in transactional data.
Multifact	This subject area type consists of two or more fact tables at different dimensional levels. The fact tables are joined by conformed (shared) dimensions. Multifact allows you to perform combined fact analysis. Not all dimensions have a relationship with all the fact tables. For example, the quota metric table has a relationship only with the Owned By User, Quota, and the Date dimensions. These dimensions are also called conforming dimensions in dimensional-modeling terminology. In a multifact subject area, if you select attributes from a dimension and a metric from a fact, and they have no direct relationship with each other, then your report will not work correctly. In some cases, the metric field is empty, or an error appears in the report. Multifact subject areas are appropriate when you want to report on multiple, yet related, sets of metrics.
Summary	This subject area type consists of a single summarized fact table. It allows you to perform summary analysis of metrics using a key dimension. It is called *summary*, because it provides summary information for a specific dimension or record type in Oracle CRM On Demand analytics, such as the Account record type. From this subject area, you can obtain all the CRM functionality related metrics, such as sales revenue, service request, activity, and lead metrics. Summary subject areas are appropriate when you want summaries of metrics, using a key dimension, but without analyzing these metrics, using other dimensions.
Many-to-Many (M:M)	This subject area type represents both many-to-many and one-to-many relationships between two record types. It contains a fact table but it might also be a subject area without a fact table.

Subject Area Type	Description
	The one-to-many relationship between Custom Object 01 and Account can also be reported from this subject area. However, if you want to report on the many-to-one relationship between Account and Custom Object 01, then do not use this subject area. The Custom Object 01 subject area, which is a simple design subject area, allows you to report on all of the many-to-one relationships between all the standard record types and Custom Object 01. The Many-to-Many subject areas are the only ones that you can use to report on the many-to-many and one-to-many relationships between record types.
Federated	This subject area type allows you to report on both one-to-many and many-to-one relationships between the Custom Object record types and other record types, but not on many-to-many relationships.

The first four types of subject areas mentioned (Simple, Multifact, Summary, and Many-to-Many) are standard subject areas. The fifth type of subject area is a federated subject area for custom objects.

Standard Subject Areas

Standard subject areas are intended to report on the relationship among standard record types, including Custom Objects 01, 02, and 03. Standard record types and Custom Objects 01, 02, and 03 can have the following relationships:

- One-to-many
- Many-to-one
- Many-to-many

Oracle CRM On Demand provides dedicated subject areas that allow the reporting of a many-to-one relationship between a standard record type and other record types. For example, the Opportunities subject area allows the reporting of an opportunity record type's relationship with other record types. Dedicated subject areas also allow the reporting of a many-to-many relationship between two record types. For example, the Opportunity and Partner History subject area allows the reporting of a many-to-many relationship between opportunity and partner record types.

Federated Subject Areas

There are two Federated subject areas:

- The Advanced Custom Objects Real-Time Reporting subject area allows you to report on the relationships between Custom Objects 04 through 40 and multiple other record types, including Custom Objects 01, 02, and 03. All types of relationships can be reported on using this subject area, except for the many-to-many relationship between Custom Objects 04 through 40 and other record types, which is not supported directly by Oracle CRM On Demand.

  The Advanced Custom Objects Real-Time Reporting subject area is the only subject area that unites the reporting of all custom objects and their associated objects under a single subject area.
- The Advanced Custom Objects Historical Analytics subject area allows you to report on the relationships between Custom Objects 01 through 05 and accounts, activities, campaigns, contacts, leads, opportunities, partners, and service requests.

In a Federated subject area, the concept of a single driving record type does not apply. The lack of a driving record type means that you must always add a default metric to the analysis. Because a federated subject area does not have a single driving object, the analysis must always contain a metric in order to choose a relationship path among objects. In non-Federated subject areas, you do not need to choose a metric because the relationship is defined already in the repository using an implicit fact metric.

A Federated subject area provides access to the metrics for the supported related record types, so that you can build a summary report for the related metrics. Using the Advanced Custom Objects Real-Time Reporting subject area, you can build a summary analysis that includes most of the record types in Oracle CRM On Demand.

With a Federated subject area, you can build analyses that show the one-to-many and many-to-many relationships for the supported record types. In the many-to-many design, you must use the subject area for the standard record type (for example, the Account record type) and the custom object subject area to report on the one-to-many relationship, and you must use the custom object subject area to report on the one-to-many relationship between other record types and that custom object. By using the Advanced Custom Objects Real-Time Reporting subject area and the Advanced Custom Objects Historical Analytics subject area, you can have access to both types of relationships. However, a many-to-many analysis is not available in these subject areas.

Record Type Renaming in Analytics

Oracle provides record type renaming in analytics for all standard record types. Company administrators can rename record types in Oracle CRM On Demand. These new names are reflected in the analytics part of Oracle CRM On Demand. The renamed record types appear with their new names in subject areas, reports, and dashboards. For example, if a company administrator changes the account record type name to *Physician* in Oracle CRM On Demand, then the word *Account* is replaced in all of the answers and subject areas. So, the subject area *Account Address* becomes *Physician Address.* The subject area *Account Metrics* becomes *Physician Metrics,* and so on.

Row_ID and Object ID

For each record type in a subject area (such as account, activity, asset, and so on) the Row_ID field in the database is mapped to a field named <object> ID, for example, one of the following: Account ID, Lead ID, Service Request ID, and so on.

Optimized Custom Fields

Some dimensions have custom fields that are optimized to reduce the query time when they are used in filters. Optimized custom fields are in folders where the name ends with Optimized Custom Fields, Optimized Custom Metrics, or Optimized Picklist Fields (Code), such as Account Optimized Custom Fields, Opportunity Optimized Custom Metrics, and Account Optimized Picklist Fields (Code). Numeric custom fields, such as those with a type of CUR, INT, or NUM, are available as metrics in the optimized custom metrics folder, if the record type is the driving object in a specific subject area. For example, the Account record type is the driving object in the Account History subject area.

Some dimensions in real-time subject areas have fields that are optimized for reducing the query time when they are used in filters. Optimized fields end with the words Code or UTC. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Similarly, there is an Indexed Date UTC field, which is the optimized version of the Indexed Date field. Using the optimized field in the filter generates faster queries. This method is faster than using the standard field. For information on using optimized filtering fields, see Using Optimized Filtering Fields (on page 966).

Book Hierarchy Support in Analytics

In dimensions where the Book hierarchy is supported, you can analyze metrics and related attributes at any level of the book hierarchy. The maximum number of hierarchy levels that is supported for Analytics is nine, that is, eight sublevel books and the top-level book. For more information about which dimensions support the book hierarchy, see Book Hierarchy Support in Analytics (on page 968).

Account Addresses Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and addresses. In other subject areas, it is possible to report only the primary address of an account. However, this subject area allows the reporting of all addresses of an account along with their custom fields as well as an address shared by multiple accounts.

Relationship Type

Many-to-many

Dimensions

This subject area offers the following dimensions:

- Account
- Address

Metrics

- Address Metrics
  - Number (#) of Account Addresses

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

The Account Address Custom Fields folder is mapped to only the custom fields of the Account Addresses. If a shared address is associated to an account, only the custom fields added through the Edit option to the account addresses are available for reporting, not the custom fields of the shared address.

Account and Competitor Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and competitor accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the competitor dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports to show all the competitors for an account. Because this subject area represents the many-to-many relationship between accounts and competitor accounts, accounts that do not have an association with at least one competitor account cannot be reported using this subject area. The complete attributes that define the competitor account relationship, and which are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Account Competitor
- Campaign
- Date
- Owned By User
- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Account Custom Metrics
  - Number (#) of Accounts
  - Number (#) of Accounts with Opportunities
  - Number (#) of Activities
  - Number (#) of Contacts
  - Number (#) of Leads
  - Number (#) of Archived Leads
  - Number (#) of Qualified Leads
  - Number (#) of Rejected Leads
  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
  - Number (#) of Leads Resulting in Lost Opportunity
  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
  - Number (#) of SRs
  - Number (#) of Cancelled SRs
  - Number (#) of Closed SRs
  - Number (#) of Open SRs
  - Number (#) of Pending SRs
  - Number (#) of Opportunities
  - Number (#) of Wins
  - Potential Revenue
  - Potential Revenue (000)
  - Average (Avg) Potential Revenue
  - Average (Avg) Open SR Age
  - Average (Avg) Days to Close SR
  - Average (Avg) Minutes to Close SRs
  - Average (Avg) Open SR Age (Minutes)
  - Average (Avg) Days to Close Opportunity (Definition: The total number of days to close an opportunity divided by the number of wins.)
  - Closed Revenue
  - Closed Revenue (000)
  - Average (Avg) Closed Revenue
  - Revenue

- Revenue (000)
- Product Closed Revenue
- Average (Avg) Revenue
- Revenue
- Product Revenue (000)
- Product Closed Revenue (000)

Usage Notes

This subject area is one of a group of related subject areas. All the subject areas in this group have the same metrics and share most of the same dimensions. The only difference between them is that the first dimension in the dimension list is specific to the subject area. The subject areas in this group are as follows:

- Account and Competitor History
- Account and Partner History
- Account and Related Account History

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Relationship Contact Dimension

Accounts can be linked to an account as competitors. Any accounts that are linked to an account as competitors are listed in the Account Competitors related information section of the Account Detail page. The relationship between two accounts that are linked in this way can also have a primary contact that is different from the primary contacts on the linked accounts.

To extract information about the primary contact for the relationship between the account and the competitor, select the columns from the Relationship Contact dimension. To extract information about the primary contact for the account, select the columns from the Primary Contact folder under the Account dimension. To extract information about the primary contact for a competitor, select the columns from the Primary Contact folder under the Account Competitor dimension.

Account and Partner Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and partner accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the partner dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports to show all the partners for an account. Because this subject area represents the many-to-many relationship between accounts and partner accounts, accounts that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Account Partner
- Campaign
- Date
- Owned By User
- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Account Custom Metrics
  - Number (#) of Accounts
  - Number (#) of Accounts with Opportunities
  - Number (#) of Activities
  - Number (#) of Contacts
  - Number (#) of Leads
  - Number (#) of Archived Leads
  - Number (#) of Qualified Leads
  - Number (#) of Rejected Leads
  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
  - Number (#) of Leads Resulting in Lost Opportunity
  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
  - Number (#) of SRs
  - Number (#) of Cancelled SRs
  - Number (#) of Closed SRs
  - Number (#) of Open SRs
  - Number (#) of Pending SRs
  - Number (#) of Opportunities
  - Number (#) of Wins
  - Potential Revenue
  - Potential Revenue (000)
  - Average (Avg) Potential Revenue
  - Avg Open SR Age
  - Avg Days to Close SR
  - Avg Minutes to Close SRs
  - Avg Open SR Age (Minutes)
  - Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)

- Closed Revenue
- Closed Revenue (000)
- Avg Closed Revenue
- Revenue
- Revenue (000)
- Product Closed Revenue
- Avg Revenue
- Revenue
- Product Revenue (000)
- Product Closed Revenue (000)

Usage Notes

This subject area is one of a group of related subject areas. All the subject areas in this group have the same metrics and share most of the same dimensions. The only difference between them is that the first dimension in the dimension list is specific to the subject area. The subject areas in this group are as follows:

- Account and Competitor History
- Account and Partner History
- Account and Related Account History

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Relationship Contact Dimension

Accounts can be linked to an account as partners. Any accounts that are linked to an account as partners are listed in the Account Partners related information section of the Account Detail page. The relationship between two accounts that are linked in this way can also have a primary contact that is different from the primary contacts on the linked accounts.

To extract information about the primary contact for the relationship between the account and the partner, select the columns from the Relationship Contact dimension. To extract information about the primary contact for the account, select the columns from the Primary Contact folder under the Account dimension. To extract information about the primary contact for a partner, select the columns from the Primary Contact folder under the Account Partner dimension.

Account and Related Account Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and related accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the related account dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports to show all the related accounts for an account. Because this subject area represents the many-to-many relationship between accounts and related accounts, the accounts that do not have an association with at least one related account cannot be reported using this subject area. The complete attributes that define the related account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date

- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Date
- Owned By User
- Related Account
- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Account Custom Metrics
  - Number (#) of Accounts
  - Number (#) of Accounts with Opportunities
  - Number (#) of Activities
  - Number (#) of Contacts
  - Number (#) of Leads
  - Number (#) of Archived Leads
  - umber (#) of Qualified Leads
  - Number (#) of Rejected Leads
  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
  - Number (#) of Leads Resulting in Lost Opportunity
  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
  - Number (#) of SRs
  - Number (#) of Cancelled SRs
  - Number (#) of Closed SRs
  - Number (#) of Open SRs
  - Number (#) of Pending SRs
  - Number (#) of Opportunities
  - Number (#) of Wins
  - Potential Revenue
  - Potential Revenue (000)
  - Average (Avg) Potential Revenue
  - Avg Open SR Age
  - Avg Days to Close SR

- Avg Minutes to Close SRs
- Avg Open SR Age (Minutes)
- Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
- Closed Revenue
- Closed Revenue (000)
- Avg Closed Revenue
- Revenue
- Revenue (000)
- Product Closed Revenue
- Avg Revenue
- Revenue
- Product Revenue (000)
- Product Closed Revenue (000)

Usage Notes

This subject area is one of a group of related subject areas. All the subject areas in this group have the same metrics and share most of the same dimensions. The only difference between them is that the first dimension in the dimension list is specific to the subject area. The subject areas in this group are as follows:

- Account and Competitor History
- Account and Partner History
- Account and Related Account History

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Relationship Contact Dimension

Accounts can be linked to each other. Any accounts that are linked to an account, and are not linked as competitors or partners, are listed in the Account Relationships related information section of the Account Detail page. The relationship between two accounts that are linked in this way can also have a primary contact that is different from the primary contacts on the linked accounts.

NOTE: To link accounts to each other, you must have the Access Extended Account Relationship privilege and the Manage Extended Contact and Account Relationship Access privilege in your user role, and your administrator must add the Account Relationships related information section to the Account Detail page layout that is assigned to your role.

To extract information about primary contact for the relationship between the accounts, select the columns from the Relationship Contact dimension. To extract information about the primary contact for the account, select the columns from the Primary Contact folder under the Account dimension. To extract information about the primary contact for a linked account, select the columns from the Primary Contact folder under the Related Account dimension.

Account Contact Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and contacts. You can use it to report on all contacts associated with an account or a contact that is shared by multiple accounts. You cannot use this subject area to report on accounts that are not associated with any contact, or to report on contacts that are not linked to an account.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Contact

Metrics

- Account Contact Metrics
  - Number (#) of Account Contacts

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Account Hierarchy Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

Account hierarchies are created by specifying parent-child relationships between accounts. An account that is a child account for another account can also be a parent to another account, so the hierarchy can have multiple levels. This subject area allows you to analyze account data and to display the account hierarchy in the Account Hierarchy column in the analysis.

Relationship Type

Summary

Dimensions

This subject area has the following dimensions:

- Account
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
- Account Custom Metrics
- Account Optimized Custom Metrics
- Market Share
  - Average (Avg) Market Share
  - Market Share
- Year To Date (YTD) Revenue
  - Average (Avg) Year To Date (YTD) Revenue
  - Average (Avg) Year To Date (YTD) Revenue (000)
  - Year To Date (YTD) Revenue

  - Year To Date (YTD) Revenue (000)
- Number (#) of Accounts

Usage Notes

None

Account Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides a summary view of a company's important operating metrics for its accounts. The account record type is the record type that you want to analyze. You can use the account record type to answer questions about account performance: Which companies have the highest number of service requests? Which companies have the largest number of opportunities? This subject area allows you to group and roll up these metrics at any level by account, account territory, and date dimensions. A deeper analysis involving other business areas requires the use of other subject areas.

Relationship Type

Summary

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Date
- Owned By User
- Principal Partner Account
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Account Custom Metrics
  - Number (#) of Accounts
  - Number (#) of Accounts with Opportunities
  - Number (#) of Activities
  - Number (#) of Contacts
  - Number (#) of Leads
  - Number (#) of Archived Leads
  - Number (#) of Qualified Leads
  - Number (#) of Rejected Leads
  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
  - Number (#) of Leads Resulting in Lost Opportunity
  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
  - Number (#) of SRs

- Number (#) of Cancelled SRs
- Number (#) of Closed SRs
- Number (#) of Open SRs
- Number (#) of Pending SRs
- Number (#) of Opportunities
- Number (#) of Wins
- Potential Revenue
- Potential Revenue (000)
- Average (Avg) Potential Revenue
- Avg Open SR Age
- Avg Days to Close SR
- Avg Minutes to Close SRs
- Avg Open SR Age (Minutes)
- Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
- Closed Revenue
- Closed Revenue (000)
- Avg Closed Revenue
- Revenue
- Revenue (000)
- Product Closed Revenue
- Avg Revenue
- Revenue
- Product Revenue (000)
- Product Closed Revenue (000)

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Account Team Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and team users. Because it is possible to associate an account with various team members in Oracle CRM On Demand, you can use this subject area to create a list of all team members associated with an account or all accounts where a user is added as a team member. You cannot use this subject area to report on accounts not associated with any user or to report on users not linked to an account.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Account Team

- Date
- Team Member

Metrics

- Account Team
  - Account Team Optimized Custom Metrics
  - Number (#) of Account Team Members

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

In the Account Team Optimized Custom Fields folder for the Account Team dimension, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available:

- Check Box
- Date
- Date/Time
- Percent
- Phone
- Picklist
- Text (Long)
- Text (Short)

In the Account Team Optimized Custom Metrics folder, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available as metrics:

- Currency
- Integer
- Number

Data Visibility. If the Historical Subject Area setting for you is Manager Visibility or Team Visibility, then this subject area uses the Team Visibility mode and you can report on all the accounts for which you are either the owner or a team member. If the setting for you is Full Visibility, then accounts either owned by you or your subordinates or the records in which you or your subordinates are added as team members can be reported upon.

Activity Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze a broad set of activity metrics by activity, account, opportunity, lead, campaign, contact, service request, and date dimensions. Because this subject area represents every single activity event and interaction in connection with these record types, this subject area is at the lowest possible level, which means the activity fact table that determines this subject area might be the largest. This subject area allows you to roll up and analyze activity metrics using the broadest set of dimensions. This subject area consists of two or more fact tables, which allows the reporting of user quotas in relation to activity metrics.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Campaign
- Contact
- Date
- Dealer
- Event
- Lead
- Opportunity
- Owned By User
- Quota
- Service Request

Metrics

The complete list of metrics for this subject area is as follows:

- Activity Metrics
  - Activity Custom Metrics
  - Activity Metrics by Created Date
    - Number (#) of Activities (Created Date)
    - Number (#) of Appointments (Created Date)
    - Number (#) of Closed Activities (Created Date)
    - Number (#) of Open Activities (Created Date)
    - Number (#) of Tasks (Created Date)
  - Activity Metrics by Other Dates
    - Number (#) of Appointments (End Date)
    - Number (#) of Appointments (Start Date)
    - Number (#) of Tasks (Due Date)
  - Number (#) of Accounts with Activities
  - Number (#) of Activities
  - Number (#) of Appointments Scheduled
  - Number (#) of Calls Dialed
  - Number (#) of Calls Reached
  - Number (#) of Closed Activities
  - Number (#) of Open Activities
- Quota Metrics
  - Quota Value

Usage Notes

The Account, Activity, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

User Time Zone Enabled Fields

Normally, all times included in Analytic subject area reports display the company's time zone to ensure consistent time information no matter who generates the reports. The Activity dimension includes the following fields:

- End Time
- End Time User Time Zone
- Start Time
- Start Time User Time Zone

The End Time and Start Time fields report the activity time in the company's time zone. The End Time User Time Zone and Start Time User Time Zone fields report the same information as the standard fields do but in the user's local time zone.

Advanced Custom Objects Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyze advanced custom objects.

The Advanced Custom Objects Historical Analytics subject area is a specialized subject area that allows the reporting of the one-to-many relationship between Custom Objects 01, 02, and 03 and certain prebuilt objects, and also the reporting of the many-to-one relationship between Custom Objects 01 through 05 and certain prebuilt objects. Because the Advanced Custom Objects Historical Analytics subject area unites the reporting of a number of objects under a single subject area, it is necessary to include a determining metric for the analysis to help it choose a relationship path among the objects included in the analysis. Whenever two or more dimensions are in an analysis, Oracle CRM On Demand analytics requires a metric to relate the dimensions. If the report does not include a metric, Oracle CRM On Demand analytics chooses one randomly.

The many-to-many relationship is implemented for Custom Objects 01, 02, and 03 and account, contact, service request, and opportunity in Analytics. Therefore, it is possible to report on the one-to-many relationship between Custom Objects 01, 02, and 03 and these objects.

Relationship Type

Federated

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Campaign
- Contact
- Custom Object 01
- Custom Object 02
- Custom Object 03
- Custom Object 04
- Custom Object 05
- Lead
- Opportunity
- Owned By User
- Partner
- Service Request

Metrics

The complete list of metrics for these subject areas is as follows:

- Account Metrics
  - Account Custom Metrics
  - Account Optimized Custom Metrics
  - Number (#) of Accounts
  - Number (#) of Accounts with Opportunities
  - Average (Avg) Closed Revenue
  - Average (Avg) Revenue
  - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
- Activity Metrics
  - Activity Custom Metrics
  - Activity Metrics by Created Date
    - Number (#) of Activities
    - Number (#) of Appointments (Created Date)
    - Number (#) of Closed Activities
    - Number (#) of Open Activities
    - Number (#) of Tasks (Created Date)
  - Activity Metrics by Other Dates
    - Number (#) of Appointments (End Date)
    - Number (#) of Appointments (Start Date)
    - Number (#) of Tasks (Due Date)
  - Activity Optimized Custom Metrics
  - Number (#) of Accounts with Activities
  - Number (#) of Activities
  - Number (#) of Appointments Scheduled
  - Number (#) of Calls Dialed
  - Number (#) of Calls Reached
  - Number (#) of Closed Activities
  - Number (#) of Open Activities
- Campaign Metrics
  - Campaign Optimized Custom Metrics
  - Number (#) of Accounts for Campaign
  - Number (#) of Campaigns
  - Number (#) of Campaigns Active
  - Number (#) of Campaigns Completed
  - Number (#) of Campaigns Planned
  - Number (#) of Contacts for Campaign
  - Number (#) of Leads
  - Number (#) of Opportunities
  - Number (#) of Wins
  - Percentage (%) of Budget (Definition: The cost multiplied by 100, then divided by the budgeted cost.)

- Percentage (%) of Lead Target Achieved (Definition: The number of leads multiplied by 100, then divided by the lead target.)
- Percentage (%) of Revenue Target Achieved (Definition: The closed revenue multiplied by 100, then divided by the revenue target.)
- Average (Avg) Cost Per Closed Sale (Definition: The average cost divided by the number of wins.)
- Average (Avg) Cost Per Lead (Definition: The average cost divided by the number of leads.)
- Average (Avg) Days to Convert Lead (Definition: The number of days between the lead-created date and lead-converted date divided by the number of leads converted to opportunities.)
- Cost per Closed Sale (Definition: The cost divided by the number of wins.)
- Cost per Lead (Definition: The cost divided by the number of leads.)
- Lead Conversion Rate (Definition: The leads who became customers, expressed as a percentage.)
- Opportunity Win Rate (Definition: The total number of win opportunities, divided by the total number of won and lost opportunities.)
- Return on investment (ROI)

- Contact Metrics
  - Contact Custom Metrics
  - Contact Optimized Custom Metrics
  - Home Value
    - Average (Avg) Home Value
    - Average (Avg) Home Value (000)
    - Home Value
    - Home Value (000)
  - Total Assets
    - Average (Avg) Total Assets
    - Average (Avg) Total Assets (000)
    - Total Assets
    - Total Assets (000)
  - Total Expenses
    - Average (Avg) Total Expenses
    - Average (Avg) Total Expenses (000)
    - Total Expenses
    - Total Expenses (000)
  - Total Income
    - Average (Avg) Total Income
    - Average (Avg) Total Income (000)
    - Total Income
    - Total Income (000)
  - Total Liabilities
    - Average (Avg) Total Liabilities
    - Average (Avg) Total Liabilities (000)

    - Total Liabilities
    - Total Liabilities (000)
  - Total Net Worth
    - Average (Avg) Total Net Worth
    - Average (Avg) Total Net Worth (000)
    - Total Net Worth
    - Total Net Worth (000)
  - Year To Date (YTD) Sales
    - Average Year To Date (Avg YTD) Sales
    - Average Year To Date (Avg YTD) Sales (000)
    - Year To Date (YTD) Sales
    - Year To Date (YTD) Sales (000)
  - Number (#) of Clients
  - Number (#) of Contacts
  - Number (#) of Prospects
- Custom Object 01-05 Metrics
  - Custom Object 01-05 Custom Metrics
  - Custom Object 01-05 Optimized Custom Metrics
  - Number (#) of Custom Objects 01-05
- Lead Metrics
  - Lead Custom Metrics
  - Lead Optimized Custom Metrics
  - Number (#) of Archived Leads
  - Number (#) of Leads
  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that have been converted to opportunities.)
  - Number (#) of Leads Resulting in Lost Opportunity
  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that have been converted to opportunities and is in the Closed/Won sales stage.)
  - Number (#) of New Opportunities
  - Number (#) of Qualified Leads
  - Number (#) of Rejected Leads
  - Number (#) of Wins
  - Average (Avg) Days to Convert Lead (Definition: The number of days between the lead-created date and leadconverted date divided by the number of leads that were converted to opportunities.)
  - Avg Days to Followup Lead (Definition: The number of days to follow up on the lead divided by the number of leads.)
  - Closed Revenue for Lead
  - Expected Revenue for Lead
  - Opportunity Revenue for Lead
  - Projected Revenue
- Opportunity Metrics
  - Opportunity Custom Metrics

- Opportunity Metrics by Open Date
  - Number (#) of Contacts with Opportunities (Optys)
  - Number (#) of Open Opportunities
  - Number (#) of Opportunities
  - Number (#) of Wins
  - Average Number (Avg #) of Days in Stage
  - Average (Avg) Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)
  - Average (Avg) Sales Cycle
  - Closed Revenue
  - Expected Revenue
  - Opportunity Loss Rate
  - Opportunity Win Rate
  - Revenue
- Opportunity Optimized Custom Metrics
- Number (#) of Contacts with Opportunities (Optys)
- Number (#) of Open Opportunities
- Number (#) of Opportunities
- Number (#) of Wins
- Average Number (Avg #) of Days in Stage
- Average (Avg) Deal Size
- Average (Avg) Sales Cycle
- Closed Revenue
- Closed Revenue (000)
- Expected Revenue
- Expected Revenue (000)
- Opportunity Loss Rate
- Opportunity Win Rate
- Quarter Ago Closed Revenue
- Quarter Ago Closed Revenue (000)
- Quarter Ago Opportunity Revenue
- Quarter Ago Opportunity Revenue (000)
- Revenue
- Revenue (000)

- Partner Metrics
  - Partner Custom Metrics
  - Principal Partner Account Metrics
    - Number (#) of Approved MDF Requests
    - Number (#) of Archived Leads
    - Number (#) of Cancelled SRs
    - Number (#) of Closed SRs

- Number (#) of Days MDF Request Pending Approval
- Number (#) of Days To Approval for MDF Request
- Number (#) of Deal Registration Products
- Number (#) of Deal Registrations
- Number (#) of Deal Registrations converted to Opportunity
- Number (#) of Deal Registrations for new Customers
- Number (#) of Deal Registrations for new Opportunities
- Number (#) of Deal Registrations pending approval
- Number (#) of Deal Registrations resulting in wins
- Number (#) of Deal Registrations with Opportunities
- Number (#) of Leads
- Number (#) of Leads Converted to Opportunities
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Leads Resulting in Won Opportunity
- Number (#) of MDF Requests
- Number (#) of MDF Requests Pending Approval
- Number (#) of Open Opportunities
- Number (#) of Open SRs
- Number (#) of Opportunities
- Number (#) of Partners with Leads
- Number (#) of Partners with Opportunities
- Number (#) of Pending SRs
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads
- Number (#) of SRs
- Number (#) of Special Pricing Requests
- Number (#) of Wins
- Number (#) of approved Deal Registrations
- Number (#) of expired Deal Registrations
- Average (Avg) Closed Revenue
- Average (Avg) Potential Revenue
- Average (Avg) Number (#) of Days in Stage
- Average (Avg) Authorized Cost for Special Pricing Product
- Average (Avg) Days to Close Opportunity
- Average (Avg) Days to Close SR
- Average (Avg) Days to Convert Lead

- Average (Avg) Days to Followup Lead
- Average (Avg) Days to approval for Deal Registration
- Average (Avg) MSPR for Special Pricing Product
- Average (Avg) Open SR Age
- Average (Avg) Purchase Cost for Special Pricing Product
- Average (Avg) Requested Cost for Special Pricing Product
- Closed Revenue
- Closed Revenue (000)
- Closed Revenue for Lead
- Expected Revenue
- Expected Revenue (000)
- Expected Revenue for Lead
- MDF Amount Pre-Approved
- MDF Amount Pre-Approved (000)
- MDF Amount Requested
- MDF Amount Requested (000)
- MDF Amount Requested Pending Approval
- Opportunity Revenue for Lead
- Potential Revenue
- Potential Revenue (000)
- Product Closed Revenue
- Product Closed Revenue (000)
- Product Revenue (000)
- Revenue
- Revenue (000)
- Special Pricing Amount Authorized
- Special Pricing Amount Authorized (000)
- Special Pricing Amount Requested
- Special Pricing Amount Requested (000)
- Special Pricing Product Quantity
- Total Deal Registration Product Quantity
- Total MDF Claim Amount Approved
- Total MDF Claim Amount Approved (000)
- Total MDF Claim Amount Requested
- Total MDF Claim Amount Requested (000)
- Total Revenue on Deal Registrations

        - Total Revenue on Deal Registrations (000)
        - Total Revenue on Deal Registrations without Opportunities
        - Total Revenue on Deal Registrations without Opportunities (000)
        - Total Revenue on Open Deal Registrations
        - Total Revenue on Open Deal Registrations (000)
    - Number (#) of Partners
- Service Request Metrics
    - Service Request Custom Metrics
    - Service Request Metrics by Close Date
        - Number (#) of Cancelled Service Requests (SRs) (Close Date)
        - Number (#) of Closed Service Requests (SRs) (Close Date)
        - Average (Avg) Days to Close Service Requests (SRs) (Close Date)
        - Average (Avg) Minutes to Close Service Requests (SRs) (Close Date)
    - Service Request Optimized Custom Metrics
    - Number (#) of Cancelled Service Requests (SRs)
    - Number (#) of Closed Service Requests (SRs)
    - Number (#) of Open Service Requests (SRs)
    - Number (#) of Pending Service Requests (SRs)
    - Number (#) of Service Requests (SRs)
    - Average (Avg) Days to Close Service Request (SR)
    - Average (Avg) Minutes to Close Service Requests (SRs)
    - Average (Avg) Open Service Request (SR) Age
    - Average (Avg) Open Service Request (SR) Age (Minutes)

Usage Notes

Analyses with no results can occur due to several reasons. One reason is the lack of a metric in the analysis. Your analysis must contain at least one metric.

You can also get an analysis with no results if you are using two custom objects that are not directly linked to each other. To analyze the association between a custom object and another object including another custom object, the objects must be directly associated. For example, if an Account object is directly associated to Custom Object 01 and Custom Object 03, then you can report on the association between Account and Custom Object 01 as well as the association between Account and Custom Object 03. However, you cannot report on the combined association among Account, Custom Object 01 and Custom Object 03 unless a direct association between Custom Object 01 and Custom Object 03 is defined in the application.

Taking this example further, if an Account object is directly associated to Custom Object 01, and Custom Object 01 is directly associated to Custom Object 03, then you can report on the association between Account and Custom Object 01 as well as the association between Custom Object 01 and Custom Object 03. However, the combined association between Account, Custom Object 01, and Custom Object 03 cannot be reported on unless there is a direct association between Account and Custom Object 03 as defined in the application.

The Account, Contact, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Common Date Dimension

Many of the record-type dimensions in this subject area have a date folder, such as Date or Date Created. However, some record types share a common date dimension. If you select columns from the date folder under a record type that shares a date dimension with other record types, and if you select a metric for one of the other record types that share the same date dimension, then the analysis displays all the dates for records of the record type from which you selected the metric. For example, the Account and Contact record types share a date dimension. So, if you select the Date column from the Date Created folder under the Account folder, and if you select the Number (#) of Accounts metric, then the analysis displays all the dates on which account records were created. However, because the Account and Contact record types share a date dimension, the same result is displayed if you select the Date column from the Date Created folder under the Contact folder and the Number (#) of Accounts metric.

If you select columns from the date folder under a record type that shares a date dimension with other record types, and if you select metrics from two or more of the record types that share the same date dimension, then the analysis displays all the dates for records of all the record types from which you selected the metrics. For example, if you select the Date column from the Date Created folder under the Account folder, and if you select the Number (#) of Accounts and the Number (#) of Contacts metrics, then the analysis displays all the dates on which account records and contacts records were created. In this example, a value of 0 (zero) is displayed for the Number (#) of Contacts metric for any date on which account records were created but no contact records were created, and a value of 0 (zero) is displayed for the Number (#) of Accounts metric for any date on which contact records were created but no account records were created.

The following table lists the record types that share a common date dimension and shows the name of the date dimension as it appears for each of the record types.

Record-Type Dimension	Date Dimension
Account	Date Created
Campaign	Date
Custom Objects 01 through 05	Created Date
Lead	Date
Opportunity	Close Date
Service Request	Date

Associated Object Custom Fields

An associated object's custom fields are not available for use in reports in the Advanced Custom Objects Historical Analytics subject area. For example, if you create a field for a custom object as a related field of another custom object, then the new field is not available under the main object folder in the Advanced Custom Objects Historical Analytics subject area. However, the new field remains available in the related object's folder.

Asset Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze asset metrics by account, asset, opportunity, product, and user dimensions. It allows you to track assets and products sold to a customer or company. This subject area is one of the rare subject areas where the visibility to asset records is based on the visibility of the associated account records.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Asset
- Date
- Opportunity
- Owned By User
- Product Category
- Product

Metrics

The complete list of metrics for this subject area is as follows:

- Asset Metrics
  - Asset Metrics by Purchase Date
    - Number (#) of Assets
    - Purchase Price
    - Quantity
    - Average (Avg) Purchase Price
    - Average (Avg) Quantity
  - Asset Metrics by Ship Date
    - Number (#) of Assets
    - Purchase Price
    - Quantity
    - Average (Avg) Purchase Price
    - Average (Avg) Quantity
  - Number (#) of Assets
  - Purchase Price
  - Quantity
  - Average (Avg) Purchase Price
  - Average (Avg) Quantity

Usage Notes

You can analyze the Asset metrics by the Owned By User dimension. The Account and Asset dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Call Activity Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Call Activity History subject area enables sales managers and sales representatives to analyze call activity data by account, contact, activity, owner, product, product category, and date. Unlike the Activity History subject area, the Call Activity History subject area's metrics are based on the Life Sciences record types related to the activity including: Products Detailed, Samples Dropped,Sample Requests, Sample Request Items, and Promotional Items Dropped. This means that activities that do not have records for one or more of these related child record types cannot be reported on using this subject area.

You can use the Product Category dimension to summarize call activity metrics for different levels of a product hierarchy, such as brand, submarket, and market.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Call Activity
- Campaign
- Contact
- Date
- Opportunity
- Owned By user
- Product
- Product Category
- Products Detailed
- Sample Request
- Samples Dropped

Metrics

The complete list of metrics for this subject area is as follows:

- Call Activity Metrics
  - Products Detailed Custom Metrics
    - Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Currency
    - Average (Avg) Indexed Number
  - Sample Request Custom Metrics
  - Samples Dropped Custom Metrics
    - Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Currency
    - Average (Avg) Indexed Number
  - Number (#) of Accounts
  - Number (#) of Call Activities

- Number (#) of Call Details by Product
- Number (#) of Call Products Detailed
- Number (#) of Call Promotional Items Dropped
- Number (#) of Call Sample Request Items
- Number (#) of Call Sample Requests
- Number (#) of Call Samples Dropped
- Number (#) of Contacts
- Number (#) of Promotional Items Dropped
- Number (#) of Sample Request Items
- Number (#) of Samples Dropped

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level. You can report on attendee call, account call, and professional call records and their associated metrics.

The Number (#) of Contacts shows the quantity of distinct primary contacts, not all the contacts associated with the call.

Campaign Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area enables the comprehensive analysis of campaigns by campaign, user, and date dimensions. It allows you to analyze campaign results, performance, and the return on investment (ROI). It also contains metrics to help resolve problems in achieving campaign goals and optimizing future campaigns.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Campaigns
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Metrics
  - Number (#) of Campaigns
  - Number (#) of Campaigns Active
  - Number (#) of Campaigns Completed
  - Number (#) of Campaigns Planned
  - Number (#) of Leads
  - Number (#) of Opportunities
  - Number (#) of Wins
  - Number (#) of Accounts for Campaign

- Number (#) of Contacts for Campaign
- Percentage (%) of Budget (Definition: The cost multiplied by 100, then divided by the budgeted cost.)
- Percentage (%) of Lead Target Achieved (Definition: The number of leads multiplied by 100, then divided by the lead target.)
- Percentage (%) of Revenue Target Achieved (Definition: The closed revenue multiplied by 10, then divided by the revenue target.)
- Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
- Avg Days to Convert Lead (Definition: The number of days between the lead-created date and lead-converted date divided by the number of leads converted to opportunities.)
- Cost per Closed Sale (Definition: The cost divided by the number of wins.)
- Avg Cost Per Closed Sale (Definition: The average cost divided by the number of wins.)
- Cost per Lead (Definition: The cost divided by the number of leads.)
- Avg Cost Per Lead (Definition: The average cost divided by the number of leads.)
- Lead Conversion Rate (Definition: The leads who became customers, expressed as a percentage.)
- Revenue
- Closed Revenue
- Avg Closed Revenue
- Opportunity Win Rate (Definition: The total number of win opportunities, divided by the total number of won and lost opportunities.)
- Return on investment (ROI)

Usage Notes

None

Campaign Response Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

NOTE: Campaign response data is limited to data from Oracle Email Marketing On Demand campaigns only. It does not display response data for campaigns where the data has been entered through the Oracle CRM On Demand user interface. Oracle Email Marketing On Demand has been discontinued and no new campaigns can be started. You can continue to use this subject area to report on existing campaign data.

Business Purpose

This subject area allows you to analyze campaign information, including response data from Oracle Email Marketing On Demand campaigns. It complements the campaign subject areas, which provide the campaign performance data. It allows companies to analyze the response to an Oracle Email Marketing On Demand campaign by answering the following questions: How many people received the campaign? How many of them responded? How did they respond? How long did it take them to respond? and so on.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Campaign Recipient

- Campaign Response
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Metrics
  - Number (#) of Recipients. This metric is based on the campaign recipient field.
  - Number (#) of Hard Bounces. This metric is based on the response types of: Address Moved, Bad Address, and Bad Sender.
  - Number (#) of Soft Bounces. This metric is based on the response types of: Mailbox Problem, System Problem, Network Problem, Protocol Problem, Security Problem, Message Too Large, Vacation, and Last Resort.
  - Number (#) of Responders. This metric is based on the delivery status.
  - Number (#) of Responses. This metric is based on the delivery status.
  - Number (#) of Open Responses. This metric is based on the response type of Message Opened.
  - Number (#) of Click Through. This metric is based on the response type of Click-Through.
  - Number (#) of Opt Ins. This metric is based on the response type of Opt-In to List.
  - Number (#) of Opt Outs. This metric is based on the response type of Opt-Out from List.
  - Number (#) of Global Opt Ins. This metric is based on the response type of Global Opt-In.
  - Number (#) of Global Opt Outs. This metric is based on the response type of Global Opt-Out.
  - Average (Avg) Days to Respond. This metric is based on the delivery status.

Usage Notes

The campaign response metrics are based either on the delivery status or the response type. For example, the number of hard bounces is based on the response type, not the delivery status, even though there is a delivery status of Hard Bounce.

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Contact Addresses Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between contacts and addresses. In other subject areas, it is possible to report on only the primary address of a contact. However, this subject area allows you to report on all addresses of a contact as well as an address that is shared by multiple contacts.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Contact
- Address

Metrics

- Address Metrics

- Number (#) of Contact Addresses

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Contact Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

You can use this subject area to report on contact metrics by contact, account, campaign, owned by user, and date dimensions. The level of detail of this subject area is one row for each contact created in Oracle CRM On Demand. This subject area allows you to quickly answer the following questions: Who are the top ten employees with the largest number of contacts? Which accounts do not have any contacts? Which are the largest campaigns by contacts? How many prospects does a particular contact bring to my company?

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Contact
- Date
- Owned By User

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Metrics
  - Number (#) of Clients
  - Number (#) of Contacts
  - Number (#) of Prospects

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Contact Interests Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Contact Interests History Analytics subject area enables you to generate reports about contacts' interests for the Contact dimension. This report enables advisors and their managers to determine their clients' interests and hobbies and to select meaningful gifts for their clients, which are based on those interests. They can also use this information to host relevant appreciation events, such as golf tournaments. In this way, advisors can deepen their relationships with their clients as well as meet their clients' friends and families. These events might generate new business.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Contact
- Owned By User
- Date
- Contact Interests

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Interests Metrics
  - Number (#) of Contact Interests

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Contact Revenue Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Contact Revenue History subject area enables you to analyze product revenue data by contact, product, product category, owner and date. The metrics in this subject area include the following:

- Number (#) of products
- Average Number (Avg #) of Products
- Avg Revenue

It allows users to create reports showing different types of product revenue over time, such as projected revenue compared to actual. This comparison enables users to better understand the revenue potential and sales of products by contacts. You use the Product Category dimension to summarize Contact Revenue metrics for different levels of a product hierarchy, such as brand, submarket, and market.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Contact
- Product Category
- Product
- Contact Revenue
- Date
- Owned By User

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Revenue Metrics
  - Avg Number (#) of Products
  - Number (#) of Products
  - Avg Revenue

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Contact Team Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to report on the many-to-many relationship between contacts and team members. You can use it to list all team members associated with a contact and all contacts where a user is added as a team member. You can also use it to report on the Primary Account associated to the Contact. You cannot use this subject area to report on contacts who are not associated with any user or to report on users not linked to a contact.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Contact Team
- Date
- Team Member

Metrics

- Contact Team
  - Contact Team Optimized Custom Metrics
  - Number (#) of Contact Team Members

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

In the Contact Team Optimized Custom Fields folder for the Contact Team dimension, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available:

- Check Box
- Date
- Date/Time
- Percent

- Phone
- Picklist
- Text (Long)
- Text (Short)

In the Contact Team Optimized Custom Metrics folder, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available as metrics:

- Currency
- Integer
- Number

Data Visibility. If the Historical Subject Area setting for you is Manager Visibility or Team Visibility, then this subject area uses the Team Visibility mode and you can report on all the contacts for which you are either the owner or a team member. If the setting for you is Full Visibility, then contacts either owned by you or your subordinates or the records in which you or your subordinates are added as team members can be reported upon.

Deal Registration Historical Analytics Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

The Deal Registration reporting subject area provides information on how your partners are using deal registrations and the effect that deal registration has on your business. For example, you can do the following:

- Create a report to show the amount of revenue expected from deal registrations.
- Determine the average number of days that it takes to approve a deal registration.
- Determine the percentage of opportunities that has been registered.
- Report on the number of deal registrations that has resulted in new opportunities.
- Determine the average validity period of deal registrations.
- Report on the quarterly change in revenue from deal registrations.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Associated Customer
- Associated Opportunity
- Contact
- Date
- Deal Registration
- Final Approver
- Owned By User
- Principal Partner Account

Non-Close Date Metrics

The following metrics are not based on the Close Date of the registrations:

- Deal Registration Metrics

  - Deal Registration Custom Metrics
  - Number (#) of Deal Registrations
  - Number (#) of Deal Registrations with Opportunities
  - Number (#) of Deal Registrations without Opportunities
  - Number (#) of Deal Registrations for new Opportunities
  - Number (#) of Deal Registrations for existing Customers
  - Number (#) of Deal Registrations for new Customers
  - Number (#) of Deal Registrations converted to Opportunity
  - Number (#) of Deal Registrations pending approval
  - Number (#) of approved Deal Registrations
  - Number (#) of expired Deal Registrations
  - Number (#) of days pending approval
  - Average (Avg) Days to approval
  - Avg validity period (in days)
  - Percentage (%) of Deal Registrations Approved
  - Percentage (%) of Deal Registrations Rejected
  - Percentage (%) of Deal Registrations Returned
  - Percentage (%) of Deal Registrations converted to Opportunity
  - Number (#) of Deal Registrations resulting in wins

Close Date Metrics

The following metrics are based on the Close Date of the registrations:

- Deal Registration Metrics
  - Total Deal Size on open Deal Registrations
  - Avg Total Deal Size on open Deal Registrations
  - Total Revenue from Deal Registrations
  - Avg Total Revenue from Deal Registrations
  - Quarter Ago Total Revenue from Deal Registrations
  - Avg Quarter Ago Total Revenue from Deal Registrations

Usage Notes

The Associated Contact dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Deal Registration Product Revenue Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Deal Registration Product Revenue History subject area helps you identify trends and tendencies around your deal registration line items. It enables you to create basic queries involving Deal Registration Product Revenue metrics using core dimension attributes. It can help you answer questions such as:

- What is the maximum revenue expected from a single product on a single deal registration?
- Considering only open deal registrations, what is the average revenue for each deal registration (as calculated from revenue records)?
- How many unique products are referred to on all deal registrations (irrespective of the approval status)?

- What are the top products for all open deal registrations: by total quantity, by total revenue, by occurrence, by average quantity for each deal registration, or by average revenue for each deal registration?
- List all open deal registrations that have at least one product revenue line item with either zero or null quantity or zero or null price.
- What were the top products a quarter ago: by quantity, by revenue, by occurrence, by average quantity per deal registration, or by average revenue for each deal registration?

Relationship Type

One-to-many

Dimensions

This subject area has the following dimensions:

- Associated Contact
- Associated Customer
- Associated Opportunity
- Date (based on the Close Date of the Deal Registration)
- Deal Registration
- Deal Registration Product Revenue
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Product
- Product Category

Metrics

The subject area has the following metrics:

- Deal Registration Product Revenue Metrics
  - Deal Registration Product Revenue Custom Metrics:
    - Avg Indexed Currency
    - Avg Indexed Number
    - Indexed Currency
    - Indexed Number
  - Number (#) of Products
  - Number (#) of Products on Deal Registrations without Opportunities
  - Number (#) of Products on Open Deal Registrations
  - Average Number (Avg #) of Products on Deal Registrations without Opportunities
  - Average Number (Avg #) of Products on Open Deal Registrations
  - Avg Price
  - Avg Quantity
  - Avg Quarter Ago Total Revenue
  - Avg Revenue
  - Avg Total Quantity on Deal Registrations without Opportunities
  - Avg Total Quantity on Open Deal Registrations
  - Avg Total Revenue on Deal Registrations without Opportunities
  - Avg Total Revenue on Open Deal Registrations
  - Average Number (Avg #) of Products (Per Deal Registration)
  - Quarter Ago Total Revenue

  - Quarter Ago Total Revenue (000)
  - Total Quantity
  - Total Quantity (000)
  - Total Quantity on Deal Registrations without Opportunities
  - Total Quantity on Open Deal Registrations
  - Total Revenue
  - Total Revenue (000)
  - Total Revenue on Deal Registrations without Opportunities
  - Total Revenue on Deal Registrations without Opportunities (000)
  - Total Revenue on Open Deal Registrations
  - Total Revenue on Open Deal Registrations (000)
  - Principal Partner Account

Usage Notes

None

Dealer Historical Analytics Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Automotive Edition.

Business Purpose

The Dealer History Analytic subject area provides the ability to analyze dealer history with respect to service requests and activities.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Dealer
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Dealer Metrics
  - Dealer Custom Metrics
  - Number (#) of Dealers
  - Number (#) of Service Requests (SRs)
  - Number (#) of Activities
  - Number (#) of Open Activities
  - Number (#) of Closed Activities

Usage Notes

None

Event Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

An event can be any type of promotional or educational event that is attended by sales personnel or other professionals. From a company's perspective, the following are the event types:

- **Sales Representative Level.** Executed by a manager or one or more sales representatives.
- **Corporate or National Level.** A national training event or meeting targeted at a specific group of professionals.

You can plan events at the national level for either a specific product or period and then allocate resources by region, district, or sales representative. For example, pharmaceutical companies require metrics and information about medical events to align sales and marketing activities. From a compliance perspective, reports provide information to companies, so that companies can control their budgets and ensure that there is little or no deviation.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Account Event
- Date
- Event
- Invitees
- Lead
- Lead Event
- Opportunity
- Opportunity Event
- Owned By User
- Product
- Product Category

Metrics

The complete list of metrics for this subject area is as follows:

- Event Metrics
  - Number (#) of Accounts for Event
  - Number (#) of Events
  - Number (#) of Invitees
  - Number (#) of Leads for Event
  - Number (#) of Opportunities for Event
  - Budget Surplus/Shortfall

    (Definition: The difference between the event budget and the event cost.)
  - Event Budget

The Event Budget metric comes from the dimension. When only the Event dimension is used the metric is the sum of the dimension field value. However, when other dimensions (particularly invitee) are used, the metric is calculated as the maximum of the dimension field value.

- Event Cost

  (Definition: The cost of the completed activities for all attendees associated with an Event.)

Usage Notes

If your company changes the display name for Event to a custom name, the custom name appears in your reports.

In releases earlier than Release 29, reports that included the Product Category and Events dimensions produced no results if there was no product associated to the event. This behavior was changed in Release 29 and Product Category is now independent of Event-Product associations.

Number (#) of Accounts for Event returns the number of accounts that are associated with events that have invitees.

Number (#) of Leads for Event returns the number of leads that are associated with events that have invitees.

Number (#) of Opportunities for Event returns the number of opportunities that are associated with events that have invitees.

Events with No Invitees
Events that have zero invitees are excluded from reports, except for one special case. The only way to have a zero invitee event appear in a report is to use the Event dimension only (do not add a second dimension) and do not include any metrics.

Household Historical Analytics Subject Area

Availability

This subject area is available only in the Oracle CRM On Demand Financial Services Edition.

Business Purpose

The Household History Analytics subject area provides the ability to generate reports on households for the Contact dimension. This subject area enables advisors and their managers to answer questions, such as the following:

- Which clients belong to which households?
- How are the household assets in my book of business divided up among my clients?
- What are my top households by total asset value?

The Households History Analytics subject area also has a Portfolio dimension that can be used to report on information of associated portfolios of household contacts. Note that portfolio has only an indirect relationship with households (through contacts) and hence Portfolio dimension attributes can not be used directly to analyse the household metrics. You can combine household reports with portfolio reports to provide an enhanced client service by understanding clients as members of a household.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Contact
- Household
- Household Contact

Metrics

The complete list of metrics for this subject area is as follows:

- Household Metrics
  - Total Household Assets
    - Total Household Assets
    - Average (Avg) Total Household Assets
  - Total Household Expenses
    - Total Household Expenses
    - Avg Total Household Expenses
  - Total Household Income
    - Total Household Income
    - Avg Total Household Income
  - Total Household Liabilities
    - Total Household Liabilities
    - Avg Total Household Liabilities
  - Total Household Net Worth
    - Total Household Net Worth
    - Avg Total Household Net Worth
  - Total Contact Assets
    - Total Assets
    - Avg Total Assets
  - Total Contact Expenses
    - Total Expenses
    - Avg Total Expenses
  - Total Contact Income
    - Total Income
    - Avg Total Income
  - Total Contact Liabilities
    - Total Liabilities
    - Avg Total Liabilities
  - Total Contact Net Worth
    - Total Net Worth
    - Avg Total Net Worth
  - Household Custom Metrics
  - Number (#) of Rolled Up Contacts
  - Number (#) of Rolled Up Service Requests
  - Number (#) of Rolled Up Leads

- Number (#) of Contacts
- Number (#) of Contact Service Requests
- Number (#) of Contact Leads
- Number (#) of Households

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Lead Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze the lead metrics by account, account territory, campaign, contact, date, lead, opportunity, owned by user, and principal partner account. This subject area contains record types that refer to metrics that analyze the lead quality, lead conversion, and revenues associated with leads.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Contact
- Date
- Lead
- Opportunity
- Owned By User
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)

Metrics

The complete list of metrics for this subject area is as follows:

- Lead Metrics
  - Number (#) of Archived Leads
  - Number (#) of Leads
  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
  - Number (#) of Leads Resulting in Lost Opportunity
  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
  - Number (#) of New Opportunities
  - Number (#) of Qualified Leads
  - Number (#) of Rejected Leads
  - Number (#) of Wins

- Average (Avg) Days to Convert Lead (Definition: The number of days between the lead-created date and lead-converted date divided by the number of leads that were converted to opportunities.)
- Avg Days to Followup Lead (Definition: The number of days to follow up on the lead divided by the number of leads.)
- Closed Revenue for Lead
- Expected Revenue for Lead
- Opportunity Revenue for Lead
- Projected Revenue

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Lead Team Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between leads and team members. You can use it to list all team members associated with a lead and all leads where a user is added as a team member. You cannot use this subject area to report on leads that are not associated with any user or to report on users not linked to a lead.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Date
- Lead
- Lead Team
- Team Member

Metrics

- Lead Team
  - Lead Team Optimized Custom Metrics
  - Number (#) of Lead Team Members

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

In the Lead Team Optimized Custom Fields folder for the Lead Team dimension, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available:

- Check Box
- Date
- Date/Time
- Percent

- Phone
- Picklist
- Text (Long)
- Text (Short)

In the Lead Team Optimized Custom Metrics folder, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available as metrics:

- Currency
- Integer
- Number

Data Visibility. If the Historical Subject Area setting for you is Manager Visibility or Team Visibility, then this subject area uses the Team Visibility mode and you can report on all the leads for which you are either the owner or a team member. If the setting for you is Full Visibility, then leads either owned by you or your subordinates or the records in which you or your subordinates are added as team members can be reported upon.

MDF Request Historical Analytics Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

Market Development Funds (MDF) provide the brand owner with the ability to make marketing funds available to partners in a systematic way, so that partners sell the brand owner's products in specific geographical areas or market the brand. Through MDF Requests, partners request preapprovals of funding for marketing activities. When the brand owner approves the MDF request, partners can execute the activity and then submit an MDF claim to redeem the preapproved money that was spent.

Brand owners require metrics and information about MDF requests for each partner and quarter so that they can align marketing and channel sales. The MDF Request Historical Analytics subject area gives brand owners the required information to control their MDF budgets and ensure that funds are allocated to activities that have the maximum return on investment.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Principal Partner Account
- Campaign
- MDF Request
- Date
- Owned By User
- Approver

Metrics

The complete list of metrics for this subject area is as follows:

- MDF Request Metrics
  - MDF Request Custom Metrics
  - MDF Request Metrics by Submitted Date
    - Number (#) of MDF Requests

- Amount Requested
- Average Amount Requested
- Amount Pre-Approved
- Average Amount Pre-Approved
- Total Claim Amount Requested
- Average Total Claim Amount Requested
- Total Claim Amount Approved
- Average Total Claim Amount Approved

- Number (#) of MDF Requests
- Amount Requested
- Average Amount Requested
- Amount Pre-Approved
- Average Amount Pre-Approved
- Quarter Ago Amount Requested
- Average Quarter Ago Amount Requested
- Quarter Ago Amount Pre-Approved
- Average Quarter Ago Amount Pre-Approved
- Total Claim Amount Requested
- Average Total Claim Amount Requested
- Total Claim Amount Approved
- Average Total Claim Amount Approved
- Quarter Ago Total Claim Amount Requested
- Average Quarter Ago Total Claim Amount Requested
- Quarter Ago Total Claim Amount Approved
- Average Quarter Ago Total Claim Amount Approved
- Number (#) of MDF Request Pending Approval
- Amount Requested Pending Approval
- Number (#) of Submitted MDF Requests
- Number (#) of Approved MDF Requests
- Number (#) of Reject MDF Requests
- Number (#) of Returned MDF Requests
- Number (#) of Cancelled MDF Requests
- Number (#) of Expired MDF Requests
- Number (#) of Submitted MDF Claims
- Number (#) of Approved MDF Claims
- Number (#) of Rejected MDF Claims
- Percentage (%) of MDF Requests Approved
- Percentage (%) of MDF Requests Expired
- Percentage (%) of MDF Requests Rejected
- Percentage (%) of MDF Requests Returned
- Number (#) of Days Pending Approval
- Number (#) of Days to Approval
- Average Number (Avg #) of Days Pending Approval
- Avg Number (#) of Days To Approval

Usage Notes

If your company changes the display name for MDF Requests to a custom name, the custom name appears in your reports.

Opportunity and Competitor Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze the many-to-many relationship between opportunities and competitor accounts. This subject area is almost identical to the opportunity subject areas. The only difference is that it includes the competitor account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports that show all the competitors for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and competitor accounts, opportunities that do not have an association with at least one competitor account cannot be reported using this subject area. The attributes that define the competitor account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Date
- Opportunity
- Opportunity Competitor
- Owned By User
- Primary Contact
- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Metrics
  - Opportunity Custom Metrics
  - Opportunity Metrics by Open Date

  - Number (#) of Open Opportunities
  - Number (#) of Opportunities
  - Number (#) of Contacts with Opportunities (Optys)
  - Closed Revenue
  - Expected Revenue
  - Revenue
  - Average Number (Avg #) of Days in Stage
  - Number (#) of Wins
  - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or the amount of revenue.)
  - Avg Sales Cycle
  - Opportunity Win Rate (Definition: The number of win opportunities divided by the number of won and lost opportunities.)
  - Opportunity Loss Rate
- Revenue
- Expected Revenue
- Closed Revenue
- Number (#) of Opportunities
- Number (#) of Open Opportunities
- Number (#) of Contacts with Opportunities (Optys)
- Number (#) of Wins
- Average Number (Avg #) of Days in Stage
- Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or amount of revenue.)
- Avg Sales Cycle
- Opportunity Win Rate (Definition: The total number of win opportunities divided by the total number of won and lost opportunities.)
- Opportunity Loss Rate
- Quarter Ago Opportunity Revenue
- Quarter Ago Closed Revenue

Usage Notes

The Account and Primary Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Relationship Contact Dimension

Opportunities can be linked to an opportunity as competitors. Any opportunities that are linked to an opportunity as competitors are listed in the Opportunity Competitors related information section of the Opportunity Detail page. The relationship between two opportunities that are linked in this way can also have a primary contact that is different from the primary contacts on the linked opportunities.

To extract information about the primary contact for the relationship between the opportunity and the competitor, select the columns from the Relationship Contact dimension. To extract information about the primary contact for the opportunity, select the columns from the Primary Contact folder under the Opportunity dimension. To extract information about the primary contact for a competitor, select the columns from the Primary Contact folder under the Opportunity Competitor dimension.

Opportunity and Partner Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze the many-to-many relationship between opportunities and partner accounts. This subject area is almost identical to the opportunity subject areas. The only difference is that it includes the partner account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports that show all the partners for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and partner accounts, opportunities that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Date
- Opportunity
- Opportunity Partner
- Owned By User
- Primary Contact
- Relationship Contact
- Territory

Metrics

The list of metrics for this subject area is as follows:

- Opportunity Metrics
  - Opportunity Custom Metrics
  - Opportunity Metrics by Open Date
    - Number (#) of Open Opportunities
    - Number (#) of Opportunities
    - Number (#) of Contacts with Opportunities (Optys)
    - Closed Revenue

  - Expected Revenue
  - Revenue
  - Average Number (Avg #) of Days in Stage
  - Number (#) of Wins
  - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)
  - Avg Sales Cycle
  - Opportunity Win Rate (Definition: The number of win opportunities divided by the total number of won and lost opportunities.)
  - Opportunity Loss Rate
- Revenue
- Expected Revenue
- Closed Revenue
- Number (#) of Opportunities
- Number (#) of Open Opportunities
- Number (#) of Contacts with Optys
- Number (#) of Wins
- Average Number (Avg #) of Days in Stage
- Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)
- Avg Sales Cycle
- Opportunity Win Rate (Definition: The number of win opportunities divided by the total number of won and lost opportunities.)
- Opportunity Loss Rate
- Quarter Ago Opportunity Revenue
- Quarter Ago Closed Revenue

Usage Notes

The Account and Primary Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Relationship Contact Dimension

Opportunities can be linked to an opportunity as partners. Any opportunities that are linked to an opportunity as partners are listed in the Opportunity Partners related information section of the Opportunity Detail page. The relationship between two opportunities that are linked in this way can also have a primary contact that is different from the primary contacts on the linked opportunities.

To extract information about the primary contact for the relationship between the opportunity and the partner, select the columns from the Relationship Contact dimension. To extract information about the primary contact for the opportunity, select the columns from the Primary Contact folder under the Opportunity dimension. To extract information about the primary contact for a partner, select the columns from the Primary Contact folder under the Opportunity Partner dimension.

Opportunity Contact Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

In this subject area, you can report on all contacts associated with an opportunity or a contact that is associated with multiple opportunities. In other opportunity subject areas, you can report only on an opportunity's primary contact.

Relationship Type

Many-to-Many

Dimensions

This subject area offers the following dimensions:

- Contact
- Opportunity

Metrics

- Opportunity Contact Metrics
  - Number (#) of Opportunity Contacts

Usage Notes

None

Opportunity Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze opportunities by account, territory, campaign, contact, territory, owner, and date dimensions. This subject area consists of two or more fact tables and includes opportunity and quota metrics. Opportunity metrics are defined at the lowest level of detail in this subject area. So, you can analyze the metrics for all dimensions. However, quota metrics are at a higher level of detail and can be analyzed only by the following limited dimensions: Date (Month), Quota, and Owner.

Relationship Type

Multifact

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Date

  NOTE: The Date dimension is based on Open Date for metrics from Opportunity Metrics by Open Date and is based on Close Date for all other metrics. In all cases, the date is taken from the Revenue record, because Revenue is the fact table.

- Opportunity
- Owned By User
- Primary Contact
- Principal Partner Account
- Quota

- Territory

Metrics

The list of metrics for this subject area is as follows:

- Opportunity Metrics
  - Opportunity Custom Metrics
  - Opportunity Metrics by Open Date
    - Number (#) of Open Opportunities
    - Number (#) of Opportunities
    - Number (#) of Contacts with Opportunities (Optys)
    - Closed Revenue
    - Expected Revenue
    - Revenue
    - Average Number (Avg #) of Days in Stage
    - Number (#) of Wins
    - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)
    - Avg Sales Cycle
    - Opportunity Win Rate (Definition: The number of win opportunities divided by the number of won and lost opportunities.)
    - Opportunity Loss Rate
  - Revenue
  - Expected Revenue
  - Closed Revenue
  - Number (#) of Opportunities
  - Number (#) of Open Opportunities
  - Number (#) of Contacts with Optys
  - Number (#) of Wins
  - Average Number (Avg #) of Days in Stage
  - Avg Deal Size (Definition: The average size of each sale for each customer, expressed as the number of units or revenue amount.)
  - Avg Sales Cycle
  - Opportunity Win Rate (Definition: The number of win opportunities divided by the number of won and lost opportunities.)
  - Opportunity Loss Rate
  - Quarter Ago Opportunity Revenue
  - Quarter Ago Closed Revenue
- Quota Metrics
  - Quota Value

Usage Notes

The Account and Primary Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

The Opportunities Reporting subject area and the Opportunity Historical Analytic subject area provide different metrics. Before selecting one of these subject areas, review the provided metrics in both to make sure you use the subject area that best suits your needs.

Opportunity Product Revenue Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze opportunity product revenues by account, account territory, partner, campaign, opportunity, opportunity product, owned by user, product, and product category. Because each recurring product-revenue record might have a different start date, this subject area is at the most granular level of detail and contains one row for each recurring product-revenue record within the opportunity. Given the high level of detail of this subject area, it provides the greatest flexibility to roll up data at any level of the supported dimensions. This subject area also contains the quota dimension and metrics, which allow you to report on both opportunity product revenue and quota metrics in the same report.

Relationship Type

Multifact

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Date
- Opportunity
- Opportunity Product Revenue
- Owned By User
- Primary Contact
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Product
- Product Category
- Quota
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Product Revenues Metrics
  - Number (#) of Products
  - Average Number (Avg #) of Products
- Quota Metrics
  - Quota Value

Usage Notes

The Account and Primary Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Opportunity Team Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the relationship between opportunities and opportunity teams. Use this subject area to query for team members involved in an opportunity.

Relationship Type

Many-to-Many.

Dimensions

This subject area offers the following dimensions:

- Account
- Date (based on the Close Date of the opportunity)
- Opportunity
- Opportunity Team
- Owned By User

Metrics

- Opportunity Team
  - Opportunity Team Optimized Custom Metrics
  - Number (#) of Opportunity Team Members

Usage Notes

Data Visibility. If the Historical Subject Area settings you defined in your profile is Manager Visibility or Team Visibility, this subject area uses the Team Visibility mode and you can report on all the opportunities for which you are either the owner or a team member. If the setting defined in your profile is Full Visibility, opportunities either owned by you or your subordinates or the records in which you or your subordinates are added as team members can be reported upon.

Partner Historical Analytics Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

The Partner History Analytic subject area provides the ability to analyze partner history. You can analyze leads, opportunities, and revenue by partner and territory.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Partner
- Territory
- Owned By User
- Date

Metrics

The complete list of metrics for this subject area is as follows:

- Owner Partner Metrics
  - Number (#) of Opportunities
    - Number (#) of Partners with Opportunities
    - Number (#) of Wins
    - Average (Avg) Closed Revenue
    - Avg Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
    - Closed Revenue
    - Closed Revenue (000)
    - Product Closed Revenue
    - Product Closed Revenue (000)
    - Product Revenue (000)
    - Number (#) of Leads
    - Number (#) of Archived Leads
    - Number (#) of Qualified Leads
    - Number (#) of Rejected Leads
    - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
    - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
    - Number (#) of Leads Resulting in Lost Opportunity
    - Avg Days to Convert Lead (Definition: The number of days between the lead-created date and lead-converted date divided by the number of leads converted to opportunities.)
    - Avg Days to Followup Lead
    - Avg Potential Revenue
    - Potential Revenue
    - Potential Revenue (000)
    - Number (#) of Partners with Leads
  - Partner Custom Metrics
  - Number (#) of Partners

Usage Notes

None

Personalized Content Delivery Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

Use the information provided by analyses from this subject area to refine content and deliver the right message to the right person at the right time. You can analyze detailing trends, collateral performance, and responses from various segments, and target your customers accordingly.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Contact
- Message Response
- Messaging Plan
- Messaging Plan Item
- Owned By User
- Product
- Product Category

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Number (#) of Accounts
- Activity Metrics
  - Activity Custom Metrics
    - Average (Avg) Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Currency
    - Indexed Number
  - Activity Metrics by Created Date
    - Number (#) of Activities
    - Number (#) of Appointments (Created Date)
    - Number (#) of Closed Activities
    - Number (#) of Open Activities
    - Number (#) of Tasks (Created Date)
  - Activity Metrics by Other Dates
    - Number (#) of Appointments (End Date)
    - Number (#) of Appointments (Start Date)
    - Number (#) of Tasks (Due Date)
  - Activity Optimized Custom Metrics
  - Number (#) of Accounts with Activities

- Number (#) of Activities
- Number (#) of Appointments Scheduled
- Number (#) of Calls Dialed
- Number (#) of Calls Reached
- Number (#) of Closed Activities
- Number (#) of Open Activities

- Contact Metrics
  - Number (#) of Contacts
- Message Response Metrics
  - Message Response Custom Metrics
    - Average (Avg) Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Currency
    - Indexed Number
  - Number (#) of Message Responses
  - Average (Avg) Sequence Number
- Messaging Plan Item Metrics
  - Messaging Plan Item Custom Metrics
    - Average (Avg) Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Currency
    - Indexed Number
  - Number (#) of Messaging Plan Items
  - Average (Avg) Sequence Number
- Messaging Plan Metrics
  - Messaging Plan Custom Metrics
    - Average (Avg) Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Currency
    - Indexed Number
  - Number (#) of Messaging Plans

Usage Notes

The Account, Activity, and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

This subject area has multiple dimensions, but not all combinations are valid. For the combinations that are invalid, an error is returned. For example, the following combinations are invalid and will produce an error:

Dimension	Dimension	Dimension
Product	Account	Message Plan

Product	Account	Message Plan Item
Product	Account	Message Response
Product	Activity	Message Plan
Product	Activity	Message Plan Item
Product	Activity	Message Response
Product	Contact	Message Plan
Product	Contact	Message Plan Item
Product	Contact	Message Response

If your visibility is Team Visibility, and your analysis includes the Messaging Plan, Messaging Plan Item, or Message Response dimensions, then Manager Visibility is applied.

Pipeline Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The pipeline history subject area provides a monthly snapshot of all opportunities in Oracle CRM On Demand. Pipeline snapshots are taken daily during the nightly process, but the archiving process keeps only the latest pipeline snapshot for each month and purges the other snapshots. These pipeline snapshots are never deleted. During the full extract, transform and load (ETL) of data, these snapshots are backed up and fully restored. If companies change their fiscal calendar type, these historical snapshots will not be realigned with their new fiscal calendar definition. For companies with a custom fiscal calendar type, these historical snapshots can be reported only for the fiscal year definitions that are defined in Oracle CRM On Demand. Snapshots are taken of opportunities without a close date or of opportunities in which the close date is in the current quarter or in a future quarter.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Date
- Opportunity
- Owned By User
- Pipeline Snapshot Date
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Historical Pipeline Metrics
  - Revenue. This metric indicates the revenue from the opportunity.
  - Expected Revenue. This metric indicates the opportunity revenue multiplied by the probability of the opportunity.
  - Closed Revenue. This metric indicates the revenue of the closed/won opportunity. When the opportunity's status is Closed/Won, then the revenue and closed revenue have the same value.
  - Revenue (000). This metric indicates the revenue from the opportunity, in thousands.
  - Expected Revenue (000). This metric indicates the opportunity revenue multiplied by the probability of the opportunity, in thousands.
  - Closed Revenue (000). This metric indicates the revenue of the closed/won opportunity, in thousands. When the opportunity's status is Closed/Won, then the revenue and closed revenue have the same value.
  - Quarter Ago Opportunity Revenue. This metric indicates the value of the revenue from one quarter ago.
  - Quarter Ago Expected Revenue. This metric indicates the value of the expected revenue from one quarter ago.
  - Quarter Ago Closed Revenue. This metric indicates the value of the closed revenue from one quarter ago.
  - Quarter Ago Opportunity Revenue (000). This metric indicates the value of the revenue from one quarter ago, in thousands.
  - Quarter Ago Expected Revenue (000). This metric indicates the value of the expected revenue from one quarter ago, in thousands.
  - Quarter Ago Closed Revenue (000). This metric indicates the value of the closed revenue from one quarter ago, in thousands.
  - Territory

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Portfolio Historical Analytics Subject Area

Availability

This subject area is available only in the Oracle CRM On Demand Financial Services Edition.

Business Purpose

This subject area provides the ability to analyze portfolio history, contacts, and products. Portfolio reports provide the capability to generate reports about portfolios for the following dimensions: Contact, Account, Product, Advisor, and Time. This report enables advisors and their managers to answer questions, such as the following:

- What financial products do clients own and what is their demographic profile?
- How much of my clients' assets are invested in which securities and asset classes?
- What is the size of assets in each advisor's book of business?
- What are the asset classes in each advisor's book of business?
- Who are my best clients by portfolio size and revenue?

This information allows you to analyze portfolios with respect to both clients and advisors.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Contact

- Date
- Institution
- Owned By User
- Portfolio
- Product

Metrics

The complete list of metrics for this subject area is as follows:

- Portfolio Metrics
  - Portfolio Custom Metrics
  - Number (#) of Portfolios
  - Total Asset Value
  - Loan Amount
  - Premium
  - Revenue
  - Face Value
  - Credit Limit
  - Average (Avg) Total Asset Value
  - Avg Loan Amount
  - Avg Premium
  - Avg Revenue
  - Avg Face Value
  - Avg Credit Limit

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

The Portfolio dimension normally includes non-financial assets such as vehicles unless your administrator has specifically excluded such non-financial assets in Portfolio lists using the Exclude Vehicle / Asset Records from Portfolio Accounts option in the Company Profile page.

Product Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area enables you to analyze revenue metrics by product, account, user, opportunity, date, and territory dimensions. The level of detail of this subject area is slightly higher than the Opportunity-Product Reporting subject area, because it allows you to analyze opportunity revenues from the focus of the product dimension. This subject area bridges the analysis gap between the Opportunities Reporting subject area and Opportunity-Product Reporting subject area.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account

- Date
- Opportunity
- Owned By User
- Products
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Product Revenue Metrics
  - Product Revenue Custom Metrics
  - Revenue
  - Product Expected Revenue
  - Product Closed Revenue
  - Product Revenue (000)
  - Product Expected Revenue (000)
  - Product Closed Revenue (000)
  - Purchase Price
  - Avg Purchase Price
  - Avg Quantity
  - Total Quantity
  - Quarter Ago Product Revenue
  - Quarter Ago Product Closed Revenue
  - Quarter Ago Product Revenue (000)
  - Quarter Ago Product Closed Revenue (000)

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

The Forecast Flag field in the Product dimension in this subject area is mapped to the Opportunity Revenue record type and if this field is selected with other Product fields (such as Product Name), only the product records that are associated to an Opportunity Product Revenue record appear in the report.

Quote Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand. The Quotes object must be provisioned by an administrator.

Business Purpose

Use this subject area to analyze quotes by account, date, opportunity, and owner dimensions.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Date

- Opportunity
- Owned By User
- Quote

Metrics

The complete list of metrics for this subject area is as follows:

- Quote Custom Metrics
- Number (#) of Quotes

Usage Notes

None.

Sales Stage Historical Analytics Subject Area

The Sales Stage History has the following subject areas.

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows analyzing opportunities at different sales stages by account, opportunity, sales stage, and date dimensions. The sales stage history subject area represents event-based historical snapshots of opportunities and only available on the historical side. Because opportunities go through multiple sales stages, this subject area is denser than the opportunities subject area with as many records as number of opportunities times sales stages they went through.

Relationship Type

Simple

Dimensions

This subject area offers the following dimensions:

- Account
- Historical Sales Stage
- Opportunity

Metrics

The following is the complete list of metrics for this subject area:

- Sales Stage Metrics
  - Avg Days in Stage
  - Number of (#) of Days in Stage
  - Number of (#) of Opportunities
  - Fallout
  - Fallout Ratio

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Within the Opportunity dimension is a folder for Owned by User. Although this folder is hierarchically under the Opportunity dimension, the Owned by User folder is its own dimension. Each dimension is related to a table in the database. When a report draws from more than one table, the measures in the report are used to relate the tables.

To illustrate this effect, consider these examples where the owner of Opportunity_A has changed from one sales stage to another:

Example 1 You select only fields from the Opportunity dimension.
Result 1: All opportunities are in the report.

Example 2: You select only fields from the Owned by User folder.
Result 2: All users are in the report, whether or not they own any records.

Example 3: You select fields from both the Opportunity dimension and the Owned by User folder.
Result 3: The report shows multiple rows for Opportunity_A; one row for each owner it had at the various sales stages.

Service Request Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze service request history, accounts, and assets. This subject area provides the ability to analyze service requests by account, contact, service request, user, partner, opportunity, and date dimensions. It helps you to measure and analyze important performance metrics of the customer service request organization, including how long service requests have been open and the average duration to close them. Using these service request performance metrics can help your company to improve customer satisfaction, employee productivity, and reduce operational costs.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Asset
- Contact
- Date

  NOTE: The Date dimension is based on Close Date for metrics from Service Request Metrics by Close Date, and is based on Opened Time for all other metrics.

- Dealer
- Opportunity
- Owned By User
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Product
- Service Request
- Vehicle

Metrics

The complete list of metrics for this subject area is as follows:

- Service Request Metrics

- Service Request Metrics by Close Date
- Number (#) of Cancelled SRs (Close Date)
    - Number (#) of Closed Service Requests (SRs) (Close Date)
    - Average (Avg) Days to Close SRs (Close Date)
    - Avg Minutes to Close SRs (Close Date)
- Service Request Custom Metrics
- Number (#) of SRs
- Number (#) of Open SRs
- Number (#) of Closed SRs
- Number (#) of Pending SRs
- Number (#) of Cancelled SRs
- Avg Open SR Age
- Avg Days to Close SR
- Avg Open SR Age (Minutes)
- Avg Minutes to Close SRs

Usage Notes

The custom fields in the Vehicle dimension are shared between the Vehicle record type and the Asset record type. The Vehicle record type has two sets of custom fields: one set that is shared with the Asset record type and appears in the Vehicle dimension, and one set that is exclusive to the Vehicle record type only. The custom fields that are exclusive to the Vehicle record type are not available in any reports. When adding custom fields to the Vehicle record type make sure that any fields that you want to appear in reports are added to the shared Asset-Vehicle custom fields and not to the Vehicle-only custom fields.

The Account, Asset, Contact, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Use the Opportunity dimension to analyze metrics and attributes in the opportunity to service request relationship.

Service Request Team Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between service requests and team members. Because it is possible to associate a service request with various team members in Oracle CRM On Demand, you can use it to list all team members associated with a service request and all service requests where a user is added as a team member. You cannot use this subject area to report on service requests that are not associated with any user or to report on users not linked to a service request.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Date (based on the Opened Time of the service request)
- Service Request

- Service Request Team
- Team Member

Metrics

- Service Request Team
  - Service Request Team Optimized Custom Metrics
  - Number (#) of Service Request Team Members

Usage Notes

The Service Request dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

In the Service Request Team Optimized Custom Fields folder for the Service Request Team dimension, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available:

- Check Box
- Date
- Date/Time
- Percent
- Phone
- Picklist
- Text (Long)
- Text (Short)

In the Service Request Team Optimized Custom Metrics folder, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available as metrics:

- Currency
- Integer
- Number

Data Visibility. If the Historical Subject Area setting for you is Manager Visibility or Team Visibility, then this subject area uses the Team Visibility mode and you can report on all the service requests for which you are either the owner or a team member. If the setting for you is Full Visibility, then service requests either owned by you or your subordinates or the records in which you or your subordinates are added as team members can be reported upon.

Shared Activities Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyze shared activities by account, contact, and user dimensions. Because these activities can be shared by one or more users in Oracle CRM On Demand, using this subject area you can report shared activities. Activities that are owned or shared with at least one user can be reported using this subject area.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Contact
- Owned By User

Metrics

- Activity Metrics
  - Activity Custom Metrics
  - Activity Metrics by Created Date
    - Number (#) of Activities
    - Number (#) of Appointments (Created Date)
    - Number (#) of Closed Activities
    - Number (#) of Open Activities
    - Number (#) of Tasks (Created Date)
  - Activity Metrics by Other Dates
    - Number (#) of Appointments (End Date)
    - Number (#) of Appointments (Start Date)
    - Number (#) of Tasks (Due Date)
  - Activity Optimized Custom Metrics
  - Number (#) of Accounts with Activities
  - Number (#) of Activities
  - Number (#) of Appointments Scheduled
  - Number (#) of Calls Dialed
  - Number (#) of Calls Reached
  - Number (#) of Closed Activities
  - Number (#) of Open Activities

Usage Notes

The Account, Activity, and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

The data visibility to the activity record is not controlled through the book association with that activity record in this subject area. You must own the activity record, or it must be shared with you so that you can see activity records in this subject area.

Shared Address Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area enables you to report on shared addresses and their associations with accounts, contacts, and their related metrics. Using this subject area, you can report on the accounts and contacts that are attached to or share the same address.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Shared Address

Metrics

The complete list of metrics for this subject area is as follows:

- Shared Address Picklist Fields
  - Indexed Picklist 1
  - Indexed Picklist 2
  - Indexed Picklist 3
  - Indexed Picklist 4
  - Indexed Picklist 5
  - Validated Status
- Shipping Address (Extended)
  - Address 1
  - Address 2
  - Address 3
  - City
  - Country
  - PO Box/Sorting Code
  - Province
  - State
  - Zip/Post Code
- Number (#) of Accounts
- Number (#) of Accounts and Contacts
- Number (#) of Contacts

Usage Notes

None

Solutions Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

In this subject area, you can analyze solutions by product, product category, service request, and expiration date dimensions, as well as the relationship between solutions and their associated service requests. You can also analyze important solution and related service requests metrics that help your company to evaluate the status and effectiveness of solutions.

Relationship Type

Many-to-Many

Dimensions

This subject area has the following dimensions:

- Expiration Date
- Product
- Product Category
- Service Request
- Solution

Metrics

The complete list of metrics for this subject area is as follows:

- Solution Custom Metrics
  - Average (Avg) Indexed Currency 0
  - Average (Avg) Indexed Number 0
  - Indexed Currency 0
  - Indexed Number 0
- Number (#) of Solutions
- Number (#) of Approved Solutions
- Number (#) of Published Solutions
- Number (#) of Obsolete Solutions
- Number (#) of SRs
- Number (#) of Open SRs
- Number (#) of Closed SRs

Usage Notes

The Service Request dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Special Pricing Product Historical Analytics Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

Special pricing requests allow partners and brand owners to execute a set of business processes, by which a partner asks the brand owner for a lower price on a product (for various reasons, such as a response to a competitive deal or general downward price trends).

This subject area provides you with the ability to perform historical analysis and report on special pricing requests and special pricing products, so you can assess partner performance. You can use metrics and information, such as authorized price reductions for each product, partner, and quarter to measure discount effectiveness and product performance in the channel.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Date (based on the Special Pricing Request Start Date)
- Deal Registration
- End Customer
- Last Approved By

- Opportunity
- Owned By User
- Principal Partner Account
- Product
- Product Category
- Special Pricing Request

Metrics

The complete list of metrics for this subject area is as follows:

- Special Pricing Product Metrics
    - Special Pricing Product Metrics by Authorized Date
        - Number (#) of Special Pricing Requests (Authorized Date)
        - Amount Authorized (Authorized Date)
        - Amount Authorized (Authorized Date) (000)
        - Amount Requested (Authorized Date)
        - Amount Requested (Authorized Date) (000)
        - Avg Amount Authorized (Authorized Date)
        - Avg Amount Requested (Authorized Date)
        - Avg Quantity (Authorized Date)
        - Quantity (Authorized Date)
    - Special Pricing Product Metrics by Submitted Date
        - Number (#) of Special Pricing Requests (Submitted Date)
        - Amount Authorized (Submitted Date)
        - Amount Authorized (Submitted Date) (000)
        - Amount Requested (Submitted Date)
        - Amount Requested (Submitted Date) (000)
        - Avg Amount Authorized (Submitted Date)
        - Avg Amount Requested (Submitted Date)
        - Avg Quantity (Submitted Date)
        - Quantity (Submitted Date)
    - Number (#) of Special Pricing Requests
    - Amount Authorized
    - Amount Authorized (000)
    - Amount Requested
    - Amount Requested (000)
    - Avg Amount Authorized
    - Avg Amount Requested
    - Avg Authorized Cost
    - Avg Authorized Discount Percent
    - Avg MSRP (Manufacturer's Suggested Retail Price)

- Avg Purchase Cost
- Avg Quantity
- Avg Requested Cost
- Avg Requested Discount Percent
- Avg Requested Resale Price
- Avg Suggested Resale Price
- Quantity
- Quarter Ago Amount Authorized
- Quarter Ago Amount Authorized (000)
- Quarter Ago Amount Requested
- Quarter Ago Amount Requested (000)
- Quarter Ago Quantity

Usage Notes

None

Usage Tracking Analysis Historical Analytics Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand. Access to this subject area requires the Usage Tracking privilege. The administrator user role is granted this privilege by default.

Business Purpose

This subject area enables users with the Usage Tracking privilege to analyze the usage of Oracle CRM On Demand within their company. Companies can analyze the usage of the following application areas in Oracle CRM On Demand:

- Application usage
- User adoption
- Setup and configuration

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Analytics Object
- Content
- Date
- Object Type
- User
- User Sign In History

Metrics

The complete list of metrics for this subject area and the fields for which they are stored is as follows:

The following table shows the Analytics Object metrics.

Metric	Description

Number (#) of Objects	Number of Analytics objects.

The following table shows the Analytics Performance metrics. These metrics represent the performance of queries. In the table, *Yes* indicates that the metric is available for the field.

Metric	User	Date (Week)	Content	Description
Number (#) of Requests	Yes	Yes	Yes	Number of requests by report name and dashboard name by week. If a report is also available on a dashboard, then the number of requests for the report reflects only the requests where it was run as a report. Because a dashboard often contains more than one report, requests run within a dashboard are not included in the count that calculates for reports.
Number (#) of Times Failed	Yes	Yes	Yes	Number of times requests failed by report and dashboard names by week.
Average (Avg) Response Time (s)	Yes	Yes	Yes	Average response time (in seconds) for requests.

The following table shows the Application Usage metrics in Oracle CRM On Demand. These metrics represent the usage of various application object types, including how many records were created, updated, and deleted. In the table, *Yes* indicates that the metric is available for the field.

Metric	User	Date (Month)	Object Type	Description
Number (#) of Records Created	Yes	Yes	Yes	Number of records created by object by user by month
Number (#) of Records Updated	Yes	Yes	Yes	Number of records updated by object by user by month
Number (#) of Records Deleted	Yes	Yes	Yes	Number of records deleted by object by user by month

The following table shows the Page View Performance metrics in Oracle CRM On Demand. In the table, *Yes* indicates that the metric is available for the field.

Metric	User	Date (Week)	Content	Description
Number (#) of Requests	Yes	Yes	Yes	Number of requests by page by week
Average (Avg) Response Time (ms)	Yes	Yes	Yes	Average response time (in milliseconds) for page views

Max Response Time (ms)	Yes	Yes	Yes	Maximum response time (in milliseconds) for page views
Min Response Time (ms)	Yes	Yes	Yes	Minimum response time (in milliseconds) for page views

NOTE: The Max Response Time and Min Response Time values are available only for the page view records that have been loaded since this feature became available. Page view records loaded in Oracle CRM On Demand Release 25 and earlier have NULL values because this data was not recorded in those releases.

The following table shows the Setup and Configuration metrics. These metrics are a snapshot of the latest setup and configuration of Oracle CRM On Demand as it existed at the time of an incremental refresh of your usage tracking data. The setup and configuration metrics are unique because they are not captured at any dimension level.

Metric	Description
Number (#) of Administrators	Number of administrators granted with any of the following privileges: Manage Company, Manage Company - Define Currencies, Manage Company - Reset All Passwords, Manage Themes, Manage Content, Manage Content - Manage Attachments and Detail Page Images, Manage Books, Manage Territories, Manage Users, Manage Roles and Access, Manage Users and Access - Manage Delegated Users
Number (#) of Assignment Rules	Number of assignment rules defined in Oracle CRM On Demand
Number (#) of Books	Number of books defined in Oracle CRM On Demand
Number (#) of Currencies	Number of currencies activated in Oracle CRM On Demand
Number (#) of Custom Fields	Number of custom fields used in Oracle CRM On Demand
Number (#) of Custom Objects	Number of custom objects deployed in Oracle CRM On Demand
Number (#) of Custom Tabs	Number of custom Web tabs used in Oracle CRM On Demand
Number (#) of Groups	Number of groups set up in Oracle CRM On Demand
Number (#) of Languages	Number of languages enabled in Oracle CRM On Demand
Number (#) of Products	Number of products defined in Oracle CRM On Demand
Number (#) of Sales Process	Number of sales processes defined in Oracle CRM On Demand
Number (#) of Territories	Number of territories set up in Oracle CRM On Demand
Number (#) of Web Applets	Number of Web applets used in Oracle CRM On Demand
Number (#) of Web Links	Number of Web links used in Oracle CRM On Demand

Number (#) of Workflows	Number of workflows set up in Oracle CRM On Demand

The following table shows the User Adoption (Monthly) metrics. These metrics allow companies to monitor and analyze the user adoption of the Oracle CRM On Demand application. In the table, *Yes* indicates that the metric is available for the field.

NOTE: Any session record that does not have a value in the Sign Out Time field is excluded from the calculation of the Number (#) of Login Seconds and Average (Avg) Login Seconds metrics for both monthly and weekly metrics, because the duration of that session cannot be calculated.

Metric	User	Date (Month)	Description
Number (#) of Active Users	No	Yes	Number of active users existing in the application per month
Number (#) of Days Since Last Login	Yes	No	Number of days since the last login by the user
Number (#) of Delegated Users	No	Yes	Number of delegated users existing in per month
Number (#) of Licenses	No	No	Number of licenses defined in the company profile
Number (#) of Login Seconds	Yes	Yes	Number of seconds a user was logged in during a given month
Number (#) of Total Logins	Yes	Yes	Number of times a user logged in during a given month. If a user logs in three times a day, it is counted as 3 logins and added to the current month's value.
Number (#) of Unique Logins	Yes	Yes	Number of unique times a user logged in during a given month. If a user logs in three times a day, it is counted as 1 unique login and added to the current month's value.
Number (#) of Unsuccessful Logins	Yes	Yes	Number of unsuccessful logins by user by month

Percentage (%) Logged In	No	Yes	Number of users logged in that month divided by the number of active users.
Average (Avg) Login Monthly Frequency	No	Yes	Number of unique logins for a given month divided by the number of users logged in for that month.
Average (Avg) Login Seconds	Yes	Yes	Number of seconds a user was logged in during a given month divided by the number of times the user logged in during that month.

The following table shows the User Adoption (Weekly) metrics. These metrics allow companies to monitor and analyze the user adoption of the Oracle CRM On Demand application. In the table, *Yes* indicates that the metric is available for the field.

Metric	User	Date (Week)	Description
Number (#) of Active Users	No	Yes	Number of active users existing in the application per week
Number (#) of Delegated Users	No	Yes	Number of delegated users existing in per week
Number (#) of Login Seconds	Yes	Yes	Number of seconds a user was logged in during a given week
Number (#) of Total Logins	Yes	Yes	Number of times a user logged in during a given week. If a user logs in three times a day, it is counted as 3 logins and added to the current week's value.
Number (#) of Unique Logins	Yes	Yes	Number of unique times a user logged in during a given week. If a user logs in three times a day, it is counted as 1 unique login and added to the current week's value.

Number (#) of Unsuccessful Logins	Yes	Yes	Number of unsuccessful logins by user by week
Percentage (%) Logged In	No	Yes	Number of users logged in that week divided by the number of active users.
Average (Avg) Login Seconds	Yes	Yes	Number of seconds a user was logged in during a given week divided by the number of times the user logged in during that week.
Average (Avg) Login Weekly Frequency	No	Yes	Number of unique logins for a given week divided by the number of users logged in for that week.

Usage Notes

This topic provides usage notes.

About Usage Tracking Data

The usage tracking data in the data warehouse refreshes weekly from information in your Oracle CRM On Demand application data. Refreshing the usage tracking data happens on weekends and does not follow the nightly, incremental refresh of the rest of the data.

Usage tracking metrics are recomputed only for the current month, and the prior month's data is not recomputed unless the week spans the end of the month. For example, when the incremental refresh for usage tracking runs on Friday, 28 May 2010, the usage tracking metrics are recomputed for the entire month of May starting from May 1, 2010. When the incremental refresh for usage tracking runs on Friday, 4 June 2010, the usage tracking metrics are recomputed for the months of both May and June, because that week spanned the months of May and June.

Usage tracking metrics are summarized by calendar months. Even though it is possible to analyze these metrics by a company’s fiscal calendars, they are not aligned with the fiscal calendar for companies with nonstandard calendars. There might be some oddity in a fiscal calendar definition especially if you are using a 4-4-5 or 5-4-4 or a custom calendar where two calendar months start in one fiscal period or no calendar month starts in a fiscal period. In situations like this, the usage tracking metrics might be inflated or missing for a given fiscal period.

Most usage tracking data is captured at the week level. Some user adoption metrics are not captured at the week level. All setup and configuration metrics are not captured at the week level. Because the usage tracking data is captured at the week level, it can be aggregated by month, quarter, and year. However, it might not produce any results if it is run at levels lower than the week level.

About User-Login History

The user-login history data that is older than 90 days is continuously purged from the Oracle CRM On Demand application. Hence, the Usage Tracking feature can support approximately 90 days of user adoption metrics when the Oracle CRM On Demand application is first upgraded to this release. However, the user adoption history data is retained in the data warehouse to support the historical trend analysis of user adoption metrics in the Oracle CRM On Demand Analytics. This data is retained until the next full refresh even after the data is purged from Oracle CRM On Demand.

Usage Tracking Metrics

Usage tracking metrics are collected by calendar week. If you are using a nonstandard calendar, such as 5-4-4, 4-4-5, or a custom fiscal calendar, then it is possible that one fiscal month or quarter might have more or fewer weeks compared to other fiscal months or quarters. So, your metrics might appear slightly inflated or deflated for a given month or quarter. This behavior is expected where your company's metrics are not fully aligned with its fiscal calendar definitions when they are analyzed by fiscal calendar months and quarters.

Analytics Object Dimension

You can combine fields from the Analytics Object dimension with fields from the User dimension only and with the Analytics Object metrics only. You cannot combine fields from the Analytics Object dimension with fields from any dimension other than the User dimension or with any metrics other than the Analytics Object metrics.

To report on the user information for the user who created an object, add fields from the Analytics Object and fields from either the User dimension, or the Created By dimension under the Analytics Object dimension. To report on the user information for the user who last modified an object, add fields from the Analytics Object and fields from the Last Modified By dimension under the Analytics Object dimension.

The weekly refresh of the usage tracking data overwrites the existing data for the Analytics objects. You must export the data each week if you want to compare the data from week to week.

Usage tracking data is collected for the following types of Analytics objects: Action, Analysis, Condition, Filter, Dashboard, Dashboard Page, and Dashboard Prompt.

When you extract and review the data for Analytics objects, consider the following points:

- Data is collected for the Analytics objects under Shared Folders only. Data is not collected for Analytics objects that are stored in personal folders.
- Data about deleted objects is not collected. If an object was deleted from the catalog during the week before the data was refreshed, then the data does not include any information about that object.
- If an object was modified more than one time during the week before the data was refreshed, then only the details for the most recent modification are available.
- If an object was created during the week before the data was refreshed and then later deleted during the same period, then the object is not included in the data for the period.
- If an object was created during a given week, and if that object was then deleted during the following week and a new Analytics object with the same name was created during the same week, then an object with that name appears as a newly created object in the data for two consecutive weeks.

Analytics Objects Metrics

You can combine the Analytics Object metrics with fields from the Analytics Object and from the User dimension only. You cannot combine the Analytics Object metrics with any other metrics or with fields from any other dimension other than Analytics Object or User dimension.

Content Dimension

The Content dimension is common to both the Analytics Performance metrics and Page View Performance metrics.

To report on Analytics Performance metrics, use the Content Category field to filter for the following condition:

```
Content Category = Analytics V3
```

To report on Page View Performance metrics, use the Content Category field to filter for the following condition:

```
Content Category = Page View
```

When analyzing Page View Performance metrics, the only Content dimension fields available are: Content Category and Content Name. For Page Views Performance, the Content Name value represents the title of the screen. For Analytics Performance, the Content Name value represents the report or dashboard name.

To display the path of the analyses and dashboards in your usage tracking analysis, use the Content Details field within the Content dimension. Content Details appear only for content for which the Content Category is set to Analytics V3.

The format for the paths for analyses and dashboards is as follows:

- Path for the personal folder of a user:

  `/users/`*`UserRowID`*

  where *UserRowID* is the Row ID of the user who is the owner of the folder. For example:

  `/users/1QA4-HQOAD`

- Path for the Company Wide Shared Folder:

  `/shared/`*`CompanyNumber`*`_Shared_Folder`

  where *CompanyNumber* is the number of your company's instance of Oracle CRM On Demand. For example:

  `/shared/9999_Shared_Folder`

- Path for the Migrated Company Wide Shared Folder:

  `/shared/Company_`*`CompanyNumber`*`_Shared_Folder`

  where *CompanyNumber* is the number of your company's instance of Oracle CRM On Demand. For example:

  `/shared/Company_9999_Shared_Folder`

  NOTE: In releases earlier than Release 38, usage for custom dashboards stored in folders under the Migrated Company Wide Shared folder was not tracked.

- The path for an analysis that is embedded in a record-type Homepage in the standard application has the suffix /_Emb. Some analyses that are run from the prebuilt dashboards under the Pre-Built Analyses folder in the catalog have the suffix /_DB. The subfolders that correspond to the /_Emb and /_DB suffixes, and the analyses in these subfolders, are not visible in the catalog.

  The following is an example of the path for an analysis that is embedded in a record-type Homepage by default in the standard application:

  `/shared/Pre-built Analysis/Customers Analytics/_Emb`

  The following is an example of the path for an analysis that is run from a prebuilt dashboard:

  `/shared/Pre-built Analysis/Customers Analytics/_DB`

Starting with Release 38, the Content Details field is populated as follows:

- For custom dashboards stored in folders under either My Folders or Shared Folders, the Content Details field is populated with the path to the dashboard as it appears in the catalog.

  For example, if a dashboard is stored in a custom folder named My Custom Dashboards directly under My Folders for a user whose user ID is 1QA4-HQOAD, then the Content Details field contains the following:

  `/users/1QA4-HQOAD/My Custom Dashboards`

  Each custom folder level is included in the path.

  As another example, if a dashboard is stored in a custom folder named Custom Account Dashboards directly under Company Wide Shared Folders for a company whose instance number is 9999, then the Content Details field contains the following:

  `/shared/9999_Shared_Folder/Custom Account Dashboards`

  NOTE: In releases earlier than Release 38, usage for custom dashboards stored in folders under My Folders was not tracked. Usage for custom dashboards stored in folders under Shared Folders was tracked, but the Content Details field was not populated.

- For analyses that are run from a dashboard, the Content Details field is populated with the path to the dashboard, including the name of the dashboard. The Content Name field is populated with the name of the embedded analysis.

  NOTE: In releases earlier than Release 38, the Content Details field was not populated for analyses embedded in a dashboard.

- For My Dashboard, that is, each user's personal dashboard, the Content Details field is populated with the following path:

  `/users/`*`UserRowID`*`/_portal`

  For example:

  `/users/1QA4-HQOAD/_portal`

  NOTE: In releases earlier than Release 38, usage for My Dashboard was not tracked.

- For dashboards stored in the system-generated Dashboards folder under Company Wide Shared Folder, the Content Details field is populated with the following path:

  `/shared/`*`CompanyNumber`*`_Shared_Folder/_portal`

  For example:

  `/shared/9999_Shared_Folder/_portal`

- For dashboards stored in the system-generated Dashboards folder under Migrated Company Wide Shared Folder, the Content Details fields is populated with the following path:

  `/shared/Company_`*`CompanyNumber`*`_Shared_Folder/_portal`

  For example:

  `/shared/Company_9999_Shared_Folder/_portal`

NOTE: Starting with Release 38, the suffix for the path for the system-generated Dashboards folders is /_portal. In earlier releases of Oracle CRM On Demand, the suffix was /Dashboards.

Analytics Performance Metrics

You cannot combine Analytics Performance metrics with any other metrics. You cannot combine the Page View Performance metrics with any other metrics. These two performance-related metrics are stored using different levels of detail, which are different from each other and from all the other metrics. The Analytics Performance metrics are captured at the content, user, and week level. These metrics are collected as each report is executed every time by each user, and they are summarized at the week level. The average response time is measured in seconds.

In contrast, the Page View Performance metrics are captured at the page and week level. These metrics are collected as each page is viewed each time, and they are summarized at the week level. The average response time is measured in milliseconds.

Analytics performance metrics can report metrics by individual users. However, page view performance is only at the company level. Most page views have a title, but for page views with missing titles the usage performance metric is reported as *Others*. Analytics performance metrics are included for shared and personal dashboards, but they are not included for dynamic queries. Both page view and Analytics content names display metrics that are based on the company default language and standard object naming. They do not support user language or object renaming.

User Sign In History Restrictions

The User Sign In History dimension specifies the source of the user sign in, such as Interactive, Web Services, Mobile, and so on. This dimension has the following restrictions:

- The only metrics that can be used with User Sign In History are the following User Adoption metrics:

  - Number of (#) Total Logins
  - Number of (#) Unsuccessful Logins
- Only the current month of data is updated by an incremental refresh.
- History data for the Sign In Type columns is not updated through an incremental refresh.

NOTE: The Sign In Type values are available only for the User Sign In records that have been loaded since this feature became available. User Sign In History records loaded in Oracle CRM On Demand Release 29 and earlier have NULL values because this data was not recorded in those releases.

User Adoption Weekly and Monthly Metrics

Weekly data does not roll up to monthly data. Monthly data is calculated separately, based on the number of days in the month.

Account Contacts Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and contacts. You can use it to report on all contacts associated with an account or a contact that is shared by multiple accounts. You cannot use this subject area to report on accounts that are not associated with any contact, or to report on contacts that are not linked to an account.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Contact

Metrics

- Account Contact Metrics
  - Number (#) of Account Contacts

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Account Revenues Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Account Revenue Analytics subject area provides the ability to track account revenues by product, category, territory, and user.

Relationship Type

Multifact

Dimensions

This subject area has the following dimensions:

- Account
- Account Revenue
- Account Territory
- Campaign
- Owned By User
- Product
- Product Category
- Quota

Metrics

The complete list of metrics for this subject area is as follows:

- Account Revenue Metrics:
  - Account Revenue Custom Metrics
  - Number (#) of Products
  - Average Number (Avg #) of Products
- Quota Metrics:
  - Quota Value

Usage Notes

For more information about account revenue capabilities, see Forecasts Real-Time Reporting Subject Area (on page 941). In the Forecast subject area, you can combine forecast, quota, and account revenues into a single, queried report. Quota folder dimensions and metrics can be combined only with Owned by User folder dimensions and metrics.

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Account Team Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and team users. Because it is possible to associate an account with various team members in Oracle CRM On Demand, you can use this subject area to create a list of all team members associated with an account or all accounts where a user is added as a team member. You cannot use this subject area to report on accounts not associated with any user or to report on users not linked to an account.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Account Team
- Date

- Team Member

Metrics

- Account Team
  - Account Team Optimized Custom Metrics
  - Number (#) of Account Team Members

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

In the Account Team Optimized Custom Fields folder for the Account Team dimension, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available:

- Check Box
- Date
- Date/Time
- Percent
- Phone
- Picklist
- Text (Long)
- Text (Short)

In the Account Team Optimized Custom Metrics folder, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available as metrics:

- Currency
- Integer
- Number

Data Visibility. This subject area always uses the Team Visibility mode, regardless of which settings are defined in your profile or in the company profile. For that reason, you can always report on all the accounts where you are either the owner or a team member.

Accounts Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides a summary view of the operating metrics for a company's accounts. The account record type is the record type that you want to analyze. You can use this subject area to answer basis questions about account performance: Which companies have the highest number of service requests? Which companies have the largest number of opportunities? This subject area allows you to group and roll up these metrics at any level by account, account territory, and date dimensions. For a deeper analysis involving other business areas, you must use other subject areas.

Relationship Type

Summary

Dimensions

This subject area has the following dimensions:

- Account

- Campaign
- Date Created
- Owned By User
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Account Custom Metrics
  - Revenue
  - Revenue (000)
  - Average (Avg) Revenue
  - Closed Revenue
  - Closed Revenue (000)
  - Average (Avg) Closed Revenue
  - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
  - Potential Revenue
  - Average (Avg) Potential Revenue
  - Revenue
  - Product Revenue (000)
  - Product Closed Revenue
  - Product Closed Revenue (000)
  - Number (#) of Accounts
  - Number (#) of Accounts with Opportunities
  - Number (#) of Activities
  - Number (#) of Contacts
  - Number (#) of Opportunities
  - Number (#) of Wins
  - Number (#) of Service Request (SRs)
  - Number (#) of Cancelled SRs
  - Number (#) of Closed SRs
  - Number (#) of Open SRs
  - Number (#) of Pending SRs
  - Average (Avg) Open SR Age
  - Average (Avg) Days to Close SR
  - Number (#) of Leads
  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
  - Number (#) of Leads Resulting in Lost Opportunity
  - Number (#) of Qualified Leads
  - Number (#) of Rejected Leads

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Accounts and Competitors Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to report on the many-to-many relationship between accounts and competitor accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the competitor dimension, which has a many-to-many relationship with the account record type. It allows you to create reports that show all the competitors for an account. Because this subject area represents the many-to-many relationship between accounts and competitor accounts, accounts that do not have an association with at least one competitor account cannot be reported using this subject area. The attributes that define the competitor account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Account Competitor
- Campaign
- Date Created
- Owned By User
- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Account Custom Metrics
  - Revenue
  - Revenue (000)
  - Average (Avg) Revenue
  - Closed Revenue
  - Closed Revenue (000)
  - Average (Avg) Closed Revenue

- Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
- Potential Revenue
- Average (Avg) Potential Revenue
- Revenue
- Product Revenue (000)
- Product Closed Revenue
- Product Closed Revenue (000)
- Number (#) of Accounts
- Number (#) of Accounts with Opportunities
- Number (#) of Activities
- Number (#) of Contacts
- Number (#) of Opportunities
- Number (#) of Wins
- Number (#) of Service Requests (SRs)
- Number (#) of Cancelled SRs
- Number (#) of Closed SRs
- Number (#) of Open SRs
- Number (#) of Pending SRs
- Average (Avg) Open SR Age
- Average (Avg) Days to Close SR
- Number (#) of Leads
- Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Relationship Contact Dimension

Accounts can be linked to an account as competitors. Any accounts that are linked to an account as competitors are listed in the Account Competitors related information section of the Account Detail page. The relationship between two accounts that are linked in this way can also have a primary contact that is different from the primary contacts on the linked accounts.

To extract information about the primary contact for the relationship between the account and the competitor, select the columns from the Relationship Contact dimension. To extract information about the primary contact for the account, select the columns from the Primary Contact folder under the Account dimension. To extract information about the primary contact for a competitor, select the columns from the Primary Contact folder under the Account Competitor dimension.

Accounts and Partners Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and partner accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the partner dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports that show all the partners for an account. Because this subject area represents the many-to-many relationship between accounts and partner accounts, the accounts that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area offers the following dimensions:

- Account
- Account Partner
- Campaign
- Date Created
- Owned By User
- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Account Custom Metrics
  - Revenue
  - Revenue (000)
  - Average (Avg) Revenue
  - Closed Revenue
  - Closed Revenue (000)
  - Average (Avg) Closed Revenue
  - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
  - Potential Revenue
  - Average (Avg) Potential Revenue
  - Revenue
  - Product Revenue (000)

- Product Closed Revenue
- Product Closed Revenue (000)
- Number (#) of Accounts
- Number (#) of Accounts with Opportunities
- Number (#) of Activities
- Number (#) of Contacts
- Number (#) of Opportunities
- Number (#) of Wins
- Number (#) of Service Requests (SRs)
- Number (#) of Cancelled SRs
- Number (#) of Closed SRs
- Number (#) of Open SRs
- Number (#) of Pending SRs
- Average (Avg) Open SR Age
- Average (Avg) Days to Close SR
- Number (#) of Leads
- Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Relationship Contact Dimension

Accounts can be linked to an account as partners. Any accounts that are linked to an account as partners are listed in the Account Partners related information section of the Account Detail page. The relationship between two accounts that are linked in this way can also have a primary contact that is different from the primary contacts on the linked accounts.

To extract information about the primary contact for the relationship between the account and the partner, select the columns from the Relationship Contact dimension. To extract information about the primary contact for the account, select the columns from the Primary Contact folder under the Account dimension. To extract information about the primary contact for a partner, select the columns from the Primary Contact folder under the Account Partner dimension.

Accounts and Related Accounts Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between accounts and related accounts. This subject area is almost identical to the account subject areas. The only difference is that it includes the related account dimension, which has a many-to-many relationship with the account record type. This subject area allows you to create reports that show all the related accounts for an account. Because this subject area represents the many-to-many relationship between accounts and related accounts, accounts that do not have an association with at least one related account cannot be reported using this subject area. The attributes that define the related account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Date Created
- Owned By User
- Related Account
- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Account Custom Metrics
  - Revenue
  - Revenue (000)
  - Average (Avg) Revenue
  - Closed Revenue
  - Closed Revenue (000)
  - Average (Avg) Closed Revenue
  - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
  - Potential Revenue
  - Average (Avg) Potential Revenue
  - Revenue
  - Product Revenue (000)
  - Product Closed Revenue
  - Product Closed Revenue (000)
  - Number (#) of Accounts
  - Number (#) of Accounts with Opportunities
  - Number (#) of Activities
  - Number (#) of Contacts

- Number (#) of Opportunities
- Number (#) of Wins
- Number (#) of Service Requests (SRs)
- Number (#) of Cancelled SRs
- Number (#) of Closed SRs
- Number (#) of Open SRs
- Number (#) of Pending SRs
- Average (Avg) Open SR Age
- Average (Avg) Days to Close SR
- Number (#) of Leads
- Number (#) of Leads Converted to Opportunities
- Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Relationship Contact Dimension

Accounts can be linked to each other. Any accounts that are linked to an account, and are not linked as competitors or partners, are listed in the Account Relationships related information section of the Account Detail page. The relationship between two accounts that are linked in this way can also have a primary contact that is different from the primary contacts on the linked accounts.

NOTE: To link accounts to each other, you must have the Access Extended Account Relationship privilege and the Manage Extended Contact and Account Relationship Access privilege in your user role, and your administrator must add the Account Relationships related information section to the Account Detail page layout that is assigned to your role.

To extract information about the primary contact for the relationship between the accounts, select the columns from the Relationship Contact dimension. To extract information about the primary contact for the account, select the columns from the Primary Contact folder under the Account dimension. To extract information about the primary contact for a linked account, select the columns from the Primary Contact folder under the Related Account dimension.

Activities Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze a set of activity metrics by activity, account, opportunity, lead, campaign, contact, service request, and date dimensions. Because this subject area represents every activity event and interaction in connection with these record types, this subject area is at the lowest level of detail, which means the activity fact table that determines this subject area might be the largest. This subject area allows you to roll up and analyze activity metrics, using the largest set of dimensions. This subject area is a multifact subject, which allows the reporting of user quotas in relation to activity metrics.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Campaign
- Contact
- Lead
- Opportunity
- Service Request
- Quota

Metrics

The complete list of metrics for this subject area is as follows:

- Activity Metrics
  - Number (#) of Activities
  - Number (#) of Open Activities
  - Number (#) of Accounts with Activities
  - Number (#) of Closed Activities
- Quota Metrics
  - Quota Value

Usage Notes

The Account, Activity, Contact and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Advanced Custom Objects Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyze advanced custom objects.

Advanced Custom Objects area is a specialized subject area that allows the reporting of the one-to-many and many-to-one relationship between Custom Objects 4 through 40 and prebuilt objects, including Custom Objects 1,2, and 3. Because the Advanced Custom Objects area unites the reporting of all objects under a single subject area, it is necessary to include a determining metric for the report to help it choose a relationship path among the objects included in the report. Whenever two or more dimensions are in a report, Oracle CRM On Demand analytics requires a metric to relate the dimensions. If the report does not include a metric, Oracle CRM On Demand analytics chooses one randomly. The reporting of the many-to-many relationship is not possible using this subject area because it is not directly supported by Oracle CRM On Demand for Custom Objects 4 through 40.

The many-to-many relationship is implemented for Custom Objects 1,2, and 3 and account, contact, service request, and opportunity in Analytics. Hence, it is possible to report on the one-to-many relationship only between Custom Objects 1,2, and 3 and these objects. It is not possible to report on the one-to-many relationship between Custom Objects 1,2, and 3 and activities, assets, leads, and products.

Relationship Type

Federated

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Allocation
- Campaign
- Claim
- Contact
- Coverage
- Custom Object 1
- Custom Object 2
- Custom Object 3
- Custom Object 04
- Custom Object 05
- Custom Object 06
- Custom Object 07
- Custom Object 08
- Custom Object 09
- Custom Object 10
- Custom Object 11
- Custom Object 12
- Custom Object 13
- Custom Object 14
- Custom Object 15
- Custom Object 16
- Custom Object 17
- Custom Object 18
- Custom Object 19
- Custom Object 20
- Custom Object 21
- Custom Object 22
- Custom Object 23
- Custom Object 24
- Custom Object 25
- Custom Object 26
- Custom Object 27
- Custom Object 28
- Custom Object 29
- Custom Object 30
- Custom Object 31
- Custom Object 32
- Custom Object 33
- Custom Object 34
- Custom Object 35

- Custom Object 36
- Custom Object 37
- Custom Object 38
- Custom Object 39
- Custom Object 40
- Damage
- Financial Account
- Financial Account Holder
- Financial Account Holding
- Financial Plan
- Financial Product
- Financial Transaction
- Household
- Insurance Property
- Inventory Period
- Involved Party
- Lead
- Opportunity
- Partner
- Policy
- Policy Holder
- Portfolio
- Product
- Sample Inventory
- Sample Transaction
- Service Request
- Solution
- Transaction Item

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Account Custom Metrics
  - Number (#) of Accounts
- Activity Metrics
  - Number (#) of Accounts with Activities
  - Number (#) of Activities
  - Number (#) of Closed Activities
  - Number (#) of Open Activities
- Allocation Metrics
  - Number (#) of Allocation
  - Average Maximum Quantity (Avg MaxQty) Allocation
  - Average Maximum Quantity (Avg MaxQty) Call
  - Average (Avg) Order By
  - Sum Maximum Quantity (MaxQty) Allocation
  - Sum Maximum Quantity (MaxQty) Call

  - Sum Order By
- Campaign Metrics
  - Number (#) of Accounts for Campaign
  - Number (#) of Campaigns
  - Number (#) of Campaigns Active
  - Number (#) of Campaigns Completed
  - Number (#) of Campaigns Planned
  - Number (#) of Contacts for Campaign
  - Number (#) of Leads for Campaign
  - Number (#) of Opportunities for Campaign
  - Number (#) of Wins for Campaign
  - Percentage (%) of Budget (Definition: The cost multiplied by 100, then divided by the budgeted cost.)
  - Percentage (%) of Lead Target Achieved (Definition: The number of leads multiplied by 100, then divided by the lead target.)
  - Percentage (%) of Revenue Target Achieved (Definition: The closed revenue multiplied by 100, then divided by the revenue target.)
  - Average (Avg) Days to Close Opportunity (Opty) for Campaign
  - Average (Avg) Closed Revenue for Campaign
  - Average (Avg) Days to Close Opportunity (Opty) for Campaign
  - Average (Avg) Cost Per Closed Sale (Definition: The average cost divided by the number of wins.)
  - Average (Avg) Cost Per Lead (Definition: The average cost divided by the number of leads.)
  - Closed Revenue for Campaign
  - Cost per Closed Sale (Definition: The cost divided by the number of wins.)
  - Cost per Lead (Definition: The cost divided by the number of leads.)
  - Lead Conversion Rate for Campaign
  - Opportunity Revenue for Campaign
  - Opportunity Win Rate for Campaign
  - Return On Investment (ROI)
- Claim Metrics
  - Claim Custom Metrics
  - Number (#) of Claims
  - Average (Avg) Amount of Liability
  - Average (Avg) Amount of Loss
  - Average (Avg) Employee Injured Number
  - Average (Avg) People Injured Number
  - Sum Amount of Liability
  - Sum Amount of Loss
  - Sum Employee Injured Number
  - Sum People Injured Number
- Contact Metrics
  - Contact Custom Metrics
  - Number (#) of Contacts
- Coverage Metrics
  - Coverage Custom Metrics
  - Number (#) of Coverages
  - Average (Avg) Deductible

  - Average (Avg) Individual Limit
  - Average (Avg) Insured Amount
  - Average (Avg) Total Limit
  - Sum Deductible
  - Sum Individual Limit
  - Sum Insured Amount
  - Sum Total Limit
- Custom Object 1-40 Metrics
  - Custom Object 1-40 Custom Metrics
  - Custom Object 1-40 Optimized Custom Metrics
  - Number (#) of Custom Objects 1-40
- Damage Metrics
  - Damage Custom Metrics
    - Number (#) of Damages
    - Average (Avg) Estimate Amount
    - Average (Avg) Property Number
    - Sum Estimate Amount
    - Sum Property Number
- Financial Account Metrics
  - Financial Account Custom Metrics
  - Number (#) of Financial Accounts
  - Average (Avg) Balance
  - Sum Balance
- Financial Account Holder Metrics
  - Financial Account Holder Custom Metrics
  - Number (#) of Financial Account Holders
- Financial Account Holding Metrics
  - Financial Account Holder Custom Metrics
  - Number (#) of Financial Account Holdings
  - Average (Avg) Performance
  - Average (Avg) Purchase Price
  - Average (Avg) Quantity
  - Average (Avg) Value
  - Sum Performance
  - Sum Purchase Price
  - Sum Quantity
  - Sum Value
- Financial Plan Metrics
  - Financial Plan Custom Metrics
  - Number (#) of Financial Plans
- Financial Product Metrics
  - Financial Product Custom Metrics
  - Number (#) of Financial Products
  - Average (Avg) Current Price

  - Sum Current Price
- Financial Transaction Metrics
  - Financial Transaction Custom Metrics
  - Number (#) of Financial Transactions
  - Average (Avg) Quantity
  - Average (Avg) Transaction Price
  - Average (Avg) Value
  - Sum Quantity
  - Sum Transaction Price
  - Sum Value
- Household Metrics
  - Household Custom Metrics
  - Total Contact Assets
    - Average (Avg) Total Assets
    - Average (Avg) Total Assets (000)
    - Total Assets
    - Total Assets (000)
  - Total Contact Expenses
    - Average (Avg) Total Expenses
    - Average (Avg) Total Expenses (000)
    - Total Expenses
    - Total Expenses (000)
  - Total Contact Income
    - Average (Avg) Total Income
    - Average (Avg) Total Income (000)
    - Total Income
    - Total Income (000)
  - Total Contact Liabilities
    - Average (Avg) Total Liabilities
    - Average (Avg) Total Liabilities (000)
    - Total Liabilities
    - Total Liabilities (000)
  - Total Contact Net Worth
    - Average (Avg) Total Net Worth
    - Average (Avg) Total Net Worth (000)
    - Total Net Worth
    - Total Net Worth (000)
  - Total Household Assets
    - Average (Avg) Total Household Assets

        - Average (Avg) Total Household Assets (000)
        - Total Household Assets
        - Total Household Assets (000)
    - Total Household Expenses
        - Average (Avg) Total Household Expenses
        - Average (Avg) Total Household Expenses (000)
        - Total Household Expenses
        - Total Household Expenses (000)
    - Total Household Income
        - Average (Avg) Total Household Income
        - Average (Avg) Total Household Income (000)
        - Total Household Income
        - Total Household Income (000)
    - Total Household Liabilities
        - Average (Avg) Total Household Liabilities
        - Average (Avg) Total Household Liabilities (000)
        - Total Household Liabilities
        - Total Household Liabilities (000)
    - Total Household Net Worth
        - Average (Avg) Total Household Net Worth
        - Average (Avg) Total Household Net Worth (000)
        - Total Household Net Worth
        - Total Household Net Worth (000)
    - Number (#) of Contact Leads
    - Number (#) of Contact Service Requests
    - Number (#) of Contacts
    - Number (#) of Households
    - Number (#) of Rolled Up Contacts
    - Number (#) of Rolled Up Leads
    - Number (#) of Rolled Up Service Requests
- Insurance Property Metrics
    - Insurance Property Custom Metrics
    - Number (#) of Insurance Properties
    - Average (Avg) Amount
    - Average (Avg) Sequence
    - Sum Amount
    - Sum Sequence
- Inventory Period Metrics
    - Inventory Period Custom Metrics

- Number (#) of Inventory Period
- Involved Party Metrics
  - Involved Party Custom Metrics
  - Number (#) of Involved Parties
- Lead Metrics
  - Number (#) of Archived Leads
  - Number (#) of Leads
  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
  - Number (#) of Leads Resulting in Lost Opportunity
  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
  - Number (#) of New Opportunities
  - Number (#) of Qualified Leads
  - Number (#) of Rejected Leads
  - Number (#) of Wins
  - Closed Revenue for Lead
  - Expected Revenue for Lead
  - Opportunity Revenue for Lead
- Opportunity Metrics
  - Opportunity Custom Metrics
  - Number (#) of Closed Opportunities
  - Number (#) of Open Opportunities
  - Number (#) of Opportunities
  - Number (#) of Wins
  - Average (Avg) Number (#) of Days in Stage
  - Closed Revenue
  - Closed Revenue (000)
  - Expected Revenue
  - Expected Revenue (000)
  - Revenue
  - Revenue (000)
- Partner Metrics
  - Partner Custom Metrics
  - Number (#) of Partners
- Policy Metrics
  - Policy Custom Metrics
  - Number (#) of Policies
  - Average (Avg) Face Amount
  - Average (Avg) Modal Premium
  - Average (Avg) Total Premium
  - Sum Face Amount
  - Sum Modal Premium
  - Sum Total Premium
- Policy Holder Metrics
  - Policy Holder Custom Metrics

  - Number (#) of Policy Holders
  - Average (Avg) Holder Percentage
  - Sum Holder Percentage
- Portfolio Metrics
  - Portfolio Custom Metrics
  - Number (#) of Portfolios
  - Average (Avg) Credit Limit
  - Average (Avg) Face Value
  - Average (Avg) Loan Amount
  - Average (Avg) Premium
  - Average (Avg) Revenue
  - Average (Avg) Total Asset Value
  - Credit Limit
  - Face Value
  - Loan Amount
  - Premium
  - Revenue
  - Total Asset Value
- Sample Inventory Metrics
  - Sample Inventory Custom Metrics
  - Number (#) of Sample Inventory
  - Average (Avg) Last Physical Count
  - Average (Avg) Opening Balance
  - Average (Avg) Physical Count
  - Average (Avg) System Count
  - Sum Last Physical Count
  - Sum Opening Balance
  - Sum Physical Count
  - Sum System Count
- Sample Transaction Metrics
  - Sample Transaction Custom Metrics
  - Number (#) of Sample Transaction
  - Average (Avg) Packages Received
  - Average (Avg) Packages Sent
  - Sum Packages Received
  - Sum Packages Sent
- Service Request Metrics
  - Service Request Custom Metrics
  - Number (#) of Cancelled SRs
  - Number (#) of Closed SRs
  - Number (#) of Open SRs
  - Number (#) of Pending SRs
  - Number (#) of SRs
  - Average (Avg) Days to Close SR
  - Average (Avg) Open SR Age
- Solution Metrics

- Solution Custom Metrics
- Number (#) of Approved Solutions
- Number (#) of Obsolete Solutions
- Number (#) of Published Solutions
- Number (#) of Solutions

- Transaction Item Metrics
  - Transaction Item Custom Metrics
  - Number (#) of Transaction Item
  - Average (Avg) Line Number
  - Average (Avg) Quantity
  - Average (Avg) Shipped Quantity
  - Sum Line Number
  - Sum Quantity
  - Sum Shipped Quantity

Usage Notes

The Portfolio dimension normally includes non-financial assets such as vehicles unless your administrator has specifically excluded such non-financial assets in Portfolio lists using the Exclude Vehicle / Asset Records from Portfolio Accounts option in the Company Profile page.

Reports with no results can occur due to several reasons. One reason is the lack of a metric in the report. Your report must contain at least one metric.

You can also get a report with no results if you are using two custom objects that are not directly linked to each other. For example, if an Account object is directly associated to Custom Object 4 and Custom Object 5, then you can report on the association between Account and Custom Object 4 as well as the association between Account and Custom Object 5. However, you cannot report on the combined association among Account, Custom Object 4, and Custom Object 5 unless there is a direct association between Custom Object 4 and Custom Object 5 defined in the application.

Taking this example further, if an Account object is directly associated to Custom Object 4 and Custom Object 4 is directly associated to Custom Object 5, then you can report on the association between Account and Custom Object 4 as well as the association between Custom Object 4 and Custom Object 5. However, the combined association between Account, Custom Object 4, and Custom Object 5 cannot be reported on unless there is a direct association between Account and Custom Object 5 as defined in the application.

The Account, Activity, Contact, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

The Portfolio dimension produces no results when used with Custom Objects 16-20. It does produce results when used with Custom Objects 1-15 and Custom Objects 21-40.

Common Owner Dimension

Most of the record-type dimensions in this subject area have an Owned By User folder. However, owner is a single common dimension that is shared by all of those record types. Therefore, if you select columns from the Owned By User folder under any record-type folder, and if you select a metric for a different record type, then the analysis displays all the owners of records of the record type from which you selected the metric. For example, if you select the Alias column from the Owned By User folder under the Service Request folder, and if you select the Number (#) of SRs metric, then the analysis displays all the owners of service request records. However, because owner is a single dimension, the same result is displayed if you select the Alias column from the Owned By User folder under the Contact folder and the Number (#) of SRs metric.

If you select columns from the Owned By User folder under any record-type folder and select metrics from two or more record types, then the analysis displays all the owners of records of all the record types from which you selected the metrics. For example, if you select the Alias column from the Owned By User folder under the Service Request folder, and if you select the Number (#) of SRs and Number (#) of Activities metrics, then the analysis displays all the owners of service request records and activity records. In this example, a value of 0 (zero) is displayed for the Number (#) of SRs metric if an owner owns activities but does not own service requests, and a value of 0 (zero) is displayed for the Number (#) of Activities metric if an owner owns service requests, but does not own activities.

Common Date Dimensions

Many of the record-type dimensions in this subject area have a date folder, such as Date, or Date Created. However, some record types share a common date dimension. If you select columns from the date folder under a record type that shares a date dimension with other record types, and if you select a metric for one of the other record types that share the same date dimension, then the analysis displays all the dates for records of the record type from which you selected the metric. For example, the Account and Contact record types share a date dimension. So, if you select the Date column from the Date Created folder under the Account folder, and if you select the Number (#) of Accounts metric, then the analysis displays all the dates on which account records were created. However, because the Account and Contact record types share a date dimension, the same result is displayed if you select the Date column from the Date Created folder under the Contact folder and the Number (#) of Accounts metric.

If you select columns from the date folder under a record type that shares a date dimension with other record types, and if you select metrics from two or more of the record types that share the same date dimension, then the analysis displays all the dates for records of all the record types from which you selected the metrics. For example, if you select the Date column from the Date Created folder under the Account folder, and if you select the Number (#) of Accounts and the Number (#) of Contacts metrics, then the analysis displays all the dates on which account records and contacts records were created. In this example, a value of 0 (zero) is displayed for the Number (#) of Contacts metric for any date on which account records were created but no contact records were created, and a value of 0 (zero) is displayed for the Number (#) of Accounts metric for any date on which contact records were created but no account records were created.

The following tables list the record types that share a common date dimension and show the name of the date dimension as it appears for each of the record types. Each table shows the details for one common date dimension.

Record-Type Dimension	Date Dimension
Account	Date Created
Campaign	Date
Contact	Date Created
Lead	Date
Opportunity	Close Date
Portfolio	Date

Record-Type Dimension	Date Dimension
Activity	Created Date
Allocation	Created Date

Record-Type Dimension	Date Dimension
Claim	Created Date
Coverage	Created Date
Custom Objects 01 through 40	Created Date
Damage	Created Date
Financial Account	Created Date
Financial Account Holder	Created Date
Financial Account Holding	Created Date
Financial Plan	Created Date
Financial Product	Created Date
Financial Transaction	Created Date
Insurance Property	Created Date
Inventory Period	Created Date
Involved Party	Created Date
Opportunity	Date Opened
Policy	Created Date
Policy Holder	Created Date
Service Request	Date Opened
Sample Inventory	Created Date
Sample Transaction	Created Date
Transaction Item	Created Date

Associated Object Custom Fields

An associated object's custom fields are not available for use in reports in the Advanced Custom Objects reporting subject area. For example, if you create a field for a custom object as a related field of another custom object, then the new field is not available under the main object folder in the Advanced Custom Objects reporting subject area. However, the new field remains available in the related object's folder.

Advanced Custom Object Subject Area and the Financials and Insurance Objects

The Advanced Custom Objects subject area enables you to report on all the attributes and metrics of the objects that exist in the subject area. It also enables you to report on the associations between these objects. However, for any given pair of objects, only one association is supported in this subject area. For example:

- The Financial Account object can be a child object of an account, a branch, and a financial Institution. However, only the account object association can be reported.
- The Financial Account object can be a child object of a contact and an advisor. However, only the contact object association can be reported.
- The Policy object can be a child object of an account, an agency, and a carrier. However, only the account object association can be reported.
- The Policy object can be a child object of a contact, an agent, and a carrier underwriter. However, only the account object association can be reported.

The association between the financial objects and custom objects 1-40 and the association between the insurance objects and custom objects 1-40 are not available for reporting from the Advanced Custom Object subject area.

Field Formats

In the financial, insurance, and sample dimensions, the currency, date, and integer fields are preformatted. Other field types in those dimensions, such as number and percentage, are not preformatted. You can apply custom formats to these fields. This formatting approach affects the following dimensions and metrics:

- Allocation
- Allocation Metrics
- Claim
- Claim Metrics
- Coverage
- Coverage Metrics
- Damage
- Damage Metrics
- Financial Account
- Financial Account Metrics
- Financial Account Holder
- Financial Account Holder Metrics
- Financial Account Holding
- Financial Account Holding Metrics
- Financial Plan
- Financial Plan Metrics
- Financial Product
- Financial Product Metrics
- Financial Transaction
- Financial Transaction Metrics
- Insurance Property
- Insurance Property Metrics
- Involved Party
- Involved Party Metrics
- Inventory Period
- Inventory Period Metrics
- Policy
- Policy Metrics

- Policy Holder
- Policy Holder Metrics
- Sample Inventory
- Sample Inventory Metrics
- Sample Transaction
- Sample Transaction Metrics
- Transaction Item
- Transaction Item Metrics

Assessments Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides real-time analytics of the assessment usage and results. You can get full visibility to assessment completion, scoring, and interaction on the other related dimensions, such as activities, contacts, and accounts.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Assessment
- Business Plan
- Contact
- Date Last Modified
- Date Started
- Lead
- Objective
- Opportunity
- Service Request

Metrics

The complete list of metrics for this subject area is as follows:

- Assessment Metrics
  - Answers
    - Number (#) of Criteria Answers
    - Answer Completed
    - Answer Not Completed
  - Criteria
    - Number (#) of Script Criteria
    - Average Number (Avg #) of Script Criteria

    - Average (Avg) Criteria Score
    - Criteria Score
    - Maximum (Max) Criteria Score
    - Minimum (Min) Criteria Score
- Script
    - Number (#) of Times Script Used
    - Percentage (%) Completed
    - Actual Script Score
    - Average (Avg) Actual Script Score
    - Average (Avg) Threshold Script Score
    - Maximum (Max) Actual Script Score
    - Minimum (Min) Actual Script Score
    - Threshold Script Score
- Assessment ID

Usage Notes

You can use the Assessment metrics only with the Assessments dimension. If some assessment metrics are deleted, then previously completed assessments do not reflect the deletion, and the results might appear to be inaccurate. You must include at least one metric for reports when you are using this subject area. If you do not want the metric to appear, then you can hide it.

Within the Assessments dimension are folders for Answer and Criteria. The fields within those folders do not have any intersections with the metrics and thus do not produce any values.

The Activity and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Assets Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze asset metrics by account, asset, opportunity, product and user dimensions. It allows you to track assets and products that were sold to a customer or company. This is one of the few subject areas where the visibility to the asset records is based on the visibility of the associated account records.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Asset
- Opportunity
- Owned By User

- Product

Metrics

The complete list of metrics for this subject area is as follows:

- Asset Metrics
  - Number (#) of Assets
  - Average Number (Avg #) of Assets

Usage Notes

You can analyze the Asset metrics by the Owned By User dimension. The Account and Asset dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Books Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Note: Access to this subject area is limited to users who have the Manage Books privilege in their role.

Business Purpose

This subject area allows you to analyze books in real-time.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Book
- User

Metrics

The complete list of metrics for this subject area is as follows:

- Book User Metrics
  - Number (#) of Books for User
  - Number (#) of Users for Book

Usage Notes

None

Business Planning Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to look at accounts, contacts, opportunities, and products within the context of business plans, objectives, plan types, periods, revenue goals, and units of measure. It also provides the ability to review actual performance compared to goals and objectives established within business plans. Results can be combined with queries from other subject areas for comparing the results with the target goals.

Relationship Type

One to many

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Book
- Business Plan
- Contact
- Custom Object 1
- Custom Object 2
- Custom Object 3
- Lead
- Objective
- Opportunity
- Period
- Plan Account
- Plan Contact
- Plan Opportunity
- Principal Partner Account
- Product
- Service Request

Metrics

The list of metrics for this subject area is as follows:

- Account Metrics
- Activity Metrics
- Business Plan Metrics
- Contact Metrics
- Custom Object 1 Metrics
- Custom Object 2 Metrics
- Custom Object 3 Metrics
- Lead Metrics
- Objective Metrics
- Opportunity Metrics
- Partner Metrics
- Period Metrics
- Plan Account Metrics
- Plan Contact Metrics
- Plan Opportunity Metrics
- Service Request Metrics

Usage Notes

This subject area has multiple dimensions, but you must use care not to mix dimensions indiscriminately. Not all combinations of dimensions yield useful results. The following list shows the driving-object dimension in bold font and which dimensions can be combined with it to produce valid results.

- **Account:** Objective, Plan Account

- **Activity:** Business Plan, Objective
- **Business Plan:** Activity, Objective, Partner, Period, Plan Account, Plan Contact, Plan Opportunity, Product
- **Contact:** Objective, Plan Contact
- **Lead:** Objective
- **Objective:** Account, Activity, Business Plan, Contact, Lead, Period, Product, Service Request
- **Opportunity:** Objective, Plan Opportunity
- **Partner:** Business Plan
- **Period:** Business Plan, Objective
- **Plan Account:** Account, Business Plan
- **Plan Contact:** Business Plan, Contact
- **Plan Opportunity:** Business Plan, Opportunity
- **Product:** Business Plan, Plan Contact
- **Service Request:** Objective

Note: When mixing dimensions in a report make sure to include metrics from these dimensions so that Oracle CRM On Demand can make the correct joins. For example, if the driving dimension is Objective and you want to use some Contact fields, then you must also include an objective metric in your query. You can suppress the printing of the metric, but it must be in the query.

The Book dimension enables you to analyze metrics and related attributes of accounts and contacts at any level of the book hierarchy.

The Activity and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Campaigns Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area enables the comprehensive analysis of campaigns by campaign, user, and date dimensions. It allows you to analyze campaign results, performance, and return on investment (ROI). It also contains metrics to help you to solve problems in achieving campaign goals and optimizing future campaigns.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Campaign
- Date
- Owned By User

Metrics

The complete list of metrics for this subject area is as follows:

- Campaign Metrics
  - Number (#) of Campaigns
  - Number (#) of Campaigns Planned
  - Number (#) of Campaigns Active
  - Number (#) of Campaigns Completed

- Number (#) of Accounts for Campaign
- Number (#) of Contacts for Campaign
- Number (#) of Leads for Campaign
- Number (#) of Opportunities for Campaign
- Number (#) of Wins for Campaign
- Percentage (%) of Budget (Definition: The cost multiplied by 100, then divided by the budgeted cost.)
- Percentage (%) of Lead Target Achieved (Definition: The number of leads multiplied by 100, then divided by the lead target.)
- Percentage (%) of Revenue Target Achieved (Definition: The closed revenue multiplied by 100, then divided by the revenue target.)
- Average (Avg) Days to Close Opportunity (Opty) for Campaign
- Cost per Closed Sale (Definition: The cost divided by the number of wins.)
- Average (Avg) Cost Per Closed Sale (Definition: The average cost divided by the number of wins.)
- Cost per Lead (Definition: The cost divided by the number of leads.)
- Average (Avg) Cost Per Lead (Definition: The average cost divided by the number of leads.)
- Lead Conversion Rate for Campaign
- Closed Revenue for Campaign
- Opportunity Revenue for Campaign
- Average (Avg) Closed Revenue for Campaign
- Opportunity Win Rate for Campaign
- ROI

Usage Notes

None

Contact Relationships Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

The Contact Relationship Reporting subject area provides the ability to analyze contact relationships. You can analyze contact relationships by account, contact, and related contact.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Owned By User
- Related Contact

Metrics

- Contact Metrics
  - Number (#) of Contacts

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

The Contact Relationships subject area reports on the many-to-many relationships between the relationships of contacts with other contacts. You cannot use it to report on the many-to-many relationships between accounts and contacts. For many-to-many relationships between accounts and contacts, use the Account Contact Historical Analytics subject area (on page 838).

Contact Team Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between contacts and team members. You can use it to list all team members associated with a contact and all contacts where a user is added as a team member. You can also use it to report on the Primary Account associated to the Contact. You cannot use this subject area to report on contacts who are not associated with any user or to report on users not linked to a contact.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Contact Team
- Date
- Team Member

Metrics

- Contact Team
  - Contact Team Optimized Custom Metrics
  - Number (#) of Contact Team Members

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

In the Contact Team Optimized Custom Fields folder for the Contact Team dimension, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available:

- Check Box
- Date
- Date/Time
- Percent
- Phone
- Picklist
- Text (Long)
- Text (Short)

In the Contact Team Optimized Custom Metrics folder, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available as metrics:

- Currency
- Integer
- Number

Data Visibility. This subject area always uses the Team Visibility mode, regardless of which settings are defined in your profile or in the company profile. For that reason, you can always report on all the contacts where you are either the owner or a team member.

Contacts Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

You can use this subject area to report on contact metrics by contact, account, campaign, owned by user, and date dimensions. The level of detail for this subject area is one row for each contact created in Oracle CRM On Demand. This subject area allows you to quickly answer questions such as the following: Who are the top ten employees with the largest contacts? Which accounts do not have any contacts? Which are the largest campaigns by contacts?

Relationship Type

Multifact

Dimensions

This subject area has the following dimensions:

- Account
- Campaign
- Contact
- Date Created
- Owned By User

Metrics

The complete list of metrics for this subject area is as follows:

- Contact Metrics
  - Contact Custom Metrics
    - Indexed Currency
    - Average (Avg) Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Number
  - Number (#) of Contacts

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Custom Objects and Accounts Real-Time Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1 and Accounts
- Custom Object 2 and Accounts
- Custom Object 3 and Accounts

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyze the many-to-many relationship between accounts and Custom Objects 1, 2, and 3. The account subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with accounts. Because this subject area represents the many-to-many relationship between accounts and Custom Objects 1, 2, and 3, the accounts that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-many

Dimensions

These subject areas have the following dimensions:

- Account
- Campaign
- Custom Object
- Date Created
- Owned By User
- Territory

Metrics

The complete list of metrics for these subject areas is as follows:

- Account Metrics
  - Account Custom Metrics
    - Indexed Currency
    - Average (Avg) Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Number
  - Revenue
  - Revenue (000)
  - Average (Avg) Revenue
  - Closed Revenue
  - Closed Revenue (000)
  - Average (Avg) Closed Revenue
  - Average (Avg) Days to Close Opportunity (Definition: The number of days to close an opportunity divided by the number of wins.)
  - Number (#) of Accounts

- Number (#) of Accounts with Opportunities
- Number (#) of Contacts
- Number (#) of Opportunities
- Number (#) of Wins
- Number (#) of Service Requests (SRs)
- Number (#) of Cancelled SRs
- Number (#) of Closed SRs
- Number (#) of Open SRs
- Number (#) of Pending SRs
- Average (Avg) Open SR Age
- Average (Avg) Days to Close SR

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Custom Objects and Contacts Real-Time Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1 and Contacts
- Custom Object 2 and Contacts
- Custom Object 3 and Contacts

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyze the many-to-many relationship between contacts and Custom Objects 1, 2, and 3. The contact subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with contacts. Because this subject area represents the many-to-many relationship between contacts and Custom Objects 1, 2, and 3, contacts that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-many

Dimensions

These subject areas have the following dimensions:

- Account
- Campaign
- Contact
- Custom Object
- Date Created
- Owned By User

Metrics

The complete list of metrics for these subject areas is as follows:

- Contact Metrics

- Contact Custom Metrics
  - Indexed Currency
  - Average (Avg) Indexed Currency
  - Indexed Number
  - Average (Avg) Indexed Number
- Number (#) of Contacts

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Custom Objects and Opportunities Real-Time Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1 and Opportunities
- Custom Object 2 and Opportunities
- Custom Object 3 and Opportunities

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyze the many-to-many relationship between opportunities and Custom Objects 1, 2, and 3. The opportunities subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with opportunities. Because this subject area represents the many-to-many relationship between opportunities and Custom Objects 1, 2, and 3, the opportunities that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-many

Dimensions

These subject areas have the following dimensions:

- Custom Object
- Account
- Campaign
- Close Date
- Date Opened
- Opportunity
- Owned By User
- Primary Contact
- Territory

Metrics

The complete list of metrics for these subject areas is as follows:

- Opportunity Metrics
  - Opportunity Custom Metrics

- Indexed Currency
- Average (Avg) Indexed Currency
- Indexed Number
- Average (Avg) Indexed Number

- Revenue
- Expected Revenue
- Closed Revenue
- Revenue (000)
- Expected Revenue (000)
- Closed Revenue (000)
- Number (#) of Opportunities
- Number (#) of Open Opportunities
- Number (#) of Closed Opportunities
- Number (#) of Wins
- Average Number (Avg #) of Days in Stage

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Custom Objects and Service Requests Real-Time Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1 and Service Requests
- Custom Object 2 and Service Requests
- Custom Object 3 and Service Requests

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to analyze the many-to-many relationship between service requests and Custom Objects 1, 2, and 3. The service requests subject area is replicated and added with the Custom Objects 1, 2, and 3 dimensions. Often companies redesign Custom Objects 1, 2, and 3 and want to report on these redesigned objects with service requests. Because this subject area represents the many-to-many relationship between opportunities and Custom Objects 1, 2, and 3, the service requests that do not have an association with at least one instance of Custom Objects 1, 2, and 3 cannot be reported using these subject areas.

Relationship Type

Many-to-Many

Dimensions

These subject areas have the following dimensions:

- Account
- Contact
- Custom Object
- Date Closed
- Date Opened

- Owned By User
- Service Request

Metrics

The complete list of metrics for these subject areas is as follows:

- Service Request Metrics
  - Service Request Custom Metrics
    - Indexed Currency
    - Average (Avg) Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Number
  - Number (#) of Service Requests (SRs)
  - Number (#) of Open SRs
  - Number (#) of Closed SRs
  - Number (#) of Pending SRs
  - Number (#) of Cancelled SRs
  - Average (Avg) Open SR Age
  - Average (Avg) Days to Close SR

Usage Notes

The Account, Contact, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Custom Objects Real-Time Reporting Subject Area

This topic covers the following reporting subject areas:

- Custom Object 1
- Custom Object 2
- Custom Object 3

Availability

These subject areas are available in all editions of Oracle CRM On Demand.

Business Purpose

These subject areas allow you to report on Custom Objects 1, 2, and 3 metrics by account, activity, campaign, contact, lead, opportunity, service request, partner, date, and Custom Objects 1, 2, and 3 dimensions. They offer the ability to analyze Custom Objects 1, 2, and 3 metrics by various related objects. The reporting of Custom Objects 1, 2, and 3 is currently available only in real time. When analyzing Custom Objects 1, 2, and 3, use only these subject areas.

Relationship Type

Simple

Dimensions

These subject areas have the following dimensions:

- Account
- Activity
- Campaign

- Contact
- Created Date
- Custom Object 1
- Custom Object 2
- Custom Object 3
- Lead
- Opportunity
- Owned By User
- Partner (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Service Request

Metrics

The complete list of metrics for these subject areas is as follows:

- Custom Object Metrics
  - Custom Object Custom Metrics
    - Indexed Currency
    - Average (Avg) Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Number
  - Number (#) of Custom Objects

Usage Notes

The Account, Activity, Contact, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Events Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

Use this subject area to report on event and related dimensions, such as account, account event, date, invitees, lead, lead event, opportunity, opportunity event, owned by user, product category, and product.

Relationship Type

One to Many

Dimensions

This subject area has the following dimensions:

- Account
- Account Event
- Date
- Event
- Invitees
- Lead
- Lead Event
- Opportunity

- Opportunity Event
- Owned By User
- Product
- Product Category

Metrics

The complete list of metrics for this subject area is as follows:

- Event Metrics
  - Number (#) of Accounts for Event
  - Number (#) of Events
  - Number (#) of Invitees
    (Definition: Number of active invitees not having a deleted status.)
  - Number (#) of Leads for Event
  - Number (#) of Opportunities for Event
  - Budget Surplus/Shortfall

    (Definition: The difference between the event budget and the event cost.)
  - Event Budget

    The Event Budget metric comes from the dimension. When only the Event dimension is used the metric is the sum of the dimension field value. However, when other dimensions (particularly invitee) are used, the metric is calculated as the budget amount divided by number of invitees.
  - Event Cost

    (Definition: The per attendee cost of an event, which is the total cost of the activities for all active attendees associated with a completed event, divided by the number of attendees.)

Usage Notes

The Event dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Number (#) of Accounts for Event returns the number of accounts that are associated with events that have invitees.

Number (#) of Leads for Event returns the number of leads that are associated with events that have invitees.

Number (#) of Opportunities for Event returns the number of opportunities that are associated with events that have invitees.

Events with No Invitees

Events that have zero invitees are excluded from reports, except for one special case. The only way to have a zero invitee event appear in a report is to use the Event dimension only (do not add a second dimension) and do not include any metrics.

Conversely, if you construct a report that uses dimensions other than the Events dimension (for example, Lead and Invitees), the rows in the report are the intersection of the Events dimension and the selected dimensions. The only rows in the report are rows that exist in all three dimensions.

Forecasts Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to report on the data generated by the Oracle CRM On Demand Forecast Module. It also allows you to compare the forecasting summary with the latest real-time opportunity data by account, territory, user, opportunity, product, date, and user quota dimensions. You can create a performance report for a sales team, showing the pipeline coverage, quota attainment, and forecast accuracy. It also allows sales managers to monitor the performance of individual team members, using the user hierarchy.

Relationship Type

Multifact

Dimensions

This subject area has the following dimensions:

- Account
- Account Revenue (see Note 1)
- Account Territory
- Book
- Close Date (see Note 2)
- Contact
- Forecast
- Forecast Date (see Note 3)
- Opportunity (see Note 4)
- Opportunity Product Revenue (see Note 4)
- Owned By User
- Product
- Product Category
- Quota

Note 1: You cannot combine the Account Revenue dimension with the Opportunity or the Opportunity Product dimensions.

Note 2: For quotas, the close date is the first day of the month for the quota period. For forecasts, the close date is the closed date for the opportunities that are in the forecast snapshots. For opportunities, the closed date is the closed date for the opportunity.

Note 3: The forecast date is the date when the forecast was run. An opportunity can be in multiple forecasts.

Note 4: Opportunity and Opportunity Product Revenue can be associated only with the Opportunity and Opportunity Product Revenue metrics.

Metrics

The complete list of metrics for this subject area is as follows:

- Account Revenue Metrics
  - Number (#) of Products
  - Average Number (Avg #) of Products
- Forecast Metrics
  - My Account Revenues
    - My Account Revenue
  - My Contact Revenues
    - My Contact Revenue
  - My Opportunities

        - My Opportunity Revenue
    - My Product Revenues
        - My Product Revenue
    - My Products
        - Closed Quantity
        - Closed Revenue
        - Expected Revenue
        - Forecasted Quantity
        - Pipeline Quantity
    - Team Summary
        - Forecast
        - Closed Revenue
        - Pipeline
        - Best Case
    - Team Product Summary
        - Closed Quantity
        - Forecasted Quantity
        - Pipeline Quantity
        - Closed Revenue
        - Expected Revenue
    - Closed Revenue
    - Pipeline
    - Forecast
    - Expected Revenue
    - Best Case
- Quota Metrics
    - Quota Value
- Opportunity Metrics
    - Opportunity Custom Metrics
        - Indexed Number
        - Average (Avg) Indexed Number
        - Indexed Number
        - Average (Avg) Indexed Number
    - Revenue
    - Expected Revenue
    - Closed Revenue
    - Revenue (000)
    - Expected Revenue (000)
    - Closed Revenue (000)

  - Number (#) of Opportunities
  - Number (#) of Open Opportunities
  - Number (#) of Closed Opportunities
  - Number (#) of Wins
  - Average Number (Avg #) of Days in Stage
- Opportunity Product Revenue Metrics
  - Number (#) of Products
  - Average Number (Avg #) of Products

Usage Notes

The following restrictions apply:

- **Multifact.** Because the Forecasts subject area is a Multifact subject area, you must ensure there is only one metric as part of a report.
- **Book dimension.** The book dimension and hierarchy allow you to group data records into books. But the data that you can see is still governed by your visibility mode in Analytics. It works only with account, account revenue, opportunity, and opportunity-product.
- **Hierarchies.** All hierarchies are limited to eight levels.
- **Revenue Split.** When the revenue split feature is configured (see Setting Up Your Company Profile and Global Defaults (on page 1123)), the forecast summary reflects the split, but the real-time opportunity metrics do not.
- **Quota Metrics.** Comparing quota metrics to other metrics is only valid at the month level and user level.
- **Forecast summary custom fields.** These fields are not available for reporting. The forecast summary generated by Oracle CRM On Demand contains rolled-up totals. Therefore, the forecast metrics in your report make sense only if you view the data by user. Viewing the forecast metrics without the user causes the value to appear incorrect.
- **Opportunity and multiple forecasts.** The same opportunity can appear in multiple forecasts. Therefore, forecast metrics must be viewed by a specific date, using the filtered-metric mechanism. Without doing this, the forecast metrics might appear incorrect.
- **Forecast and user quota metrics.** The data for revenues is the same as the forecast summary date, so all opportunities appear to be on the first day of the month. The user quota is also set for a monthly period and appears on the first day of the month. For this reason, reports that include forecast and user quota metrics make sense only if the data is aggregated for the month or at a higher level.
- **User quota metrics.** Visibility to user quota metrics is controlled using the Manager visibility regardless of the user's visibility. Hence, it is not possible for users who are not company administrators to report user quotas along with opportunity metrics when their visibility is set to Team visibility.
- **User's percentile ranking.** You cannot build a user's percentile ranking without having access to all the underlying data.
- **Calendar month and multiple forecasts.** Each calendar month can have multiple forecasts. So, a report showing the total forecast metrics must be qualified by a specific forecast date.
- **Quota and Revenue.** If your report showing the user quota and real-time opportunity revenue does not show the expected results, then it could be because there are no records that have opportunity closed dates in the same period as the quota records.
- **Monthly Forecast.** Your monthly forecast summary totals are already rolled up. So, a total for all users gives incorrect results. If you want to obtain the total this way, you must use the revenue metrics from the My Revenues folder.
- **Analytics Manager Visibility.** Use Analytics Manager Visibility if the forecast includes only people who report to you.
- **Analytics Team Visibility.** Use the Analytics Team Visibility if those people in the forecast are part of your team. If the people in the forecast are neither in your team, nor reporting to you, then the opportunity and opportunity product view does not match the forecast summary.

- **Forecast metrics**. The forecast metrics must reference a specific forecast. Use the FILTER metric function to reference the metrics by forecast date and forecast type. For example, use the FILTER metric function to obtain the forecast value for a specific forecast date, such as Sep 16, 2009. Because there are multiple forecast types, add a further filter to get only the values for Opportunity Revenue Forecast. For example:

  ```
  FILTER ("Forecast Metrics"."Forecast Revenue" USING ("Forecast Date.Date = date
  '2009-09-16' AND Forecast."Forecast Type" = 'Opportunity Revenue Forecast'))
  ```

  Using the FILTER metric function is not the same as adding a filter to the report. If you add a report filter to the filter by Forecast Date and Forecast Type, you do not get any values for the user quota or real-time revenue. If you have multiple quotas defined for each user, you must use the FILTER metric function to reference the specific quota value. For example:

  ```
  FILTER("Quota Metric"."Quota Value" USING (Quota."Quota Name" = 'Sales')
  ```

  In this example, the FILTER metric function obtains the quota value for a specific quota name (Sales). Without this filter metric, you get only the total value of all the quotas.

  The Account and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level. The Book dimension enables you to analyze metrics and related attributes of accounts and contacts at any level of the book hierarchy.

Households Real-Time Reporting Subject Area

Availability

This subject area is available only in the Oracle CRM On Demand Financial Services Edition.

Business Purpose

The Households Reporting subject area provides the ability to generate reports on households for the Contact dimension. This subject area enables advisors and their managers to answer questions, such as the following:

- Which of my clients belong to which households?
- How are the household assets in my book of business divided among my clients?
- What are my top households by total asset value?

The Households Reporting subject area also has a Portfolio dimension that can be used to report on information of associated portfolios of household contacts. The Portfolio dimension has an indirect relationship with Households (through Contacts) and so the Portfolio dimension attributes can not be used directly to analyze the household metrics. You can combine household reports with portfolio reports to provide an enhanced client service by understanding clients as members of a household.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Contact
- Household
- Household Contact
- Portfolio

Metrics

The complete list of metrics for this subject area is as follows:

- Household Metrics
  - Total Household Assets

  - Total Household Assets
  - Total Household Assets (000)
  - Average (Avg) Total Household Assets
  - Average (Avg) Total Household Assets (000)
- Total Household Expenses
  - Total Household Expenses
  - Total Household Expenses (000)
  - Average (Avg) Total Household Expenses
  - Average (Avg) Total Household Expenses (000)
- Total Household Income
  - Total Household Income
  - Total Household Income (000)
  - Average (Avg) Total Household Income
  - Average (Avg) Total Household Income (000)
- Total Household Liabilities
  - Total Household Liabilities
  - Total Household Liabilities (000)
  - Average (Avg) Total Household Liabilities
  - Average (Avg) Total Household Liabilities (000)
- Total Household Net Worth
  - Total Household Net Worth
  - Total Household Net Worth (000)
  - Average (Avg) Total Household Net Worth
  - Average (Avg) Total Household Net Worth (000)
- Total Contact Assets
  - Total Assets
  - Total Assets (000)
  - Average (Avg) Total Assets
  - Average (Avg) Total Assets (000)
- Total Contact Expenses
  - Total Expenses
  - Total Expenses (000)
  - Average (Avg) Total Expenses
  - Average (Avg) Total Expenses (000)
- Total Contact Income
  - Total Income

  - Total Income (000)
  - Average (Avg) Total Income
  - Average (Avg) Total Income (000)
- Total Contact Liabilities
  - Total Liabilities
  - Total Liabilities (000)
  - Average (Avg) Total Liabilities
  - Average (Avg) Total Liabilities (000)
- Total Contact Net Worth
  - Total Net Worth
  - Total Net Worth (000)
  - Average (Avg) Total Net Worth
  - Average (Avg) Total Net Worth (000)
- Household Custom Metrics
  - Indexed Number
  - Average (Avg) Indexed Number
  - Indexed Currency
  - Average (Avg) Indexed Currency
- Number (#) of Rolled Up Contacts
- Number (#) of Rolled Up Service Requests
- Number (#) of Rolled Up Leads
- Number (#) of Contacts
- Number (#) of Contact Service Requests
- Number (#) of Contact Leads
- Number (#) of Households

Usage Notes

The Contact dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

The Portfolio dimension normally includes non-financial assets such as vehicles unless your administrator has specifically excluded such non-financial assets in Portfolio lists using the Exclude Vehicle / Asset Records from Portfolio Accounts option in the Company Profile page.

Lead Team Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze relationships between leads and lead teams, and to query for team members associated with each lead.

Relationship Type

Many-to-Many

Dimensions

This subject area has the following dimensions:

- Account
- Date
- Lead
- Lead Team
- Team Member

Metrics

- Lead Team
  - Lead Team Optimized Custom Metrics
  - Number (#) of Lead Team Members

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Data Visibility. This subject area always uses the Team Visibility mode, regardless of which settings you defined in your profile. For that reason, you can always report on all the leads where you are either the owner or a team member.

Leads Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze lead metrics by account, account territory, campaign, contact, date, lead, opportunity, owned by user, and principal partner account. This subject area contains metrics to analyze lead quality, lead conversion, and revenues associated with leads.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Contact
- Date
- Lead
- Opportunity
- Owned By User
- Principal Partner Account

Metrics

The complete list of metrics for this subject area is as follows:

- Lead Metrics
  - Account Territory Hierarchy
    - Top Level Territory Name
    - Level 8 Territory Name
    - Level 7 Territory Name
    - Level 6 Territory Name
    - Level 5 Territory Name
    - Level 4 Territory Name
    - Level 3 Territory Name
    - Level 2 Territory Name
    - Level 1 Territory Name
  - Number (#) of Leads
  - Number (#) of Qualified Leads
  - Number (#) of Rejected Leads
  - Number (#) of Archived Leads
  - Number (#) of Leads Converted to Opportunities (Definition: The number of leads that has been converted to opportunities.)
  - Number (#) of Leads Resulting in Won Opportunity (Definition: The number of leads that has been converted to opportunities and is in the Closed/Won sales stage.)
  - Number (#) of Leads Resulting in Lost Opportunity
  - Number (#) of New Opportunities
  - Number (#) of Wins
  - Closed Revenue for Lead
  - Expected Revenue for Lead
  - Opportunity Revenue for Lead

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Master Audit Trail Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand. To access this subject area your role must have the Access Master Audit Trail and Admin Configuration Audit privilege.

Business Purpose

This subject area allows you to analyze changes made to audit trail enabled record types (such as Application, Deal Registration, and User).

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Audit Trail

- Date
- User

Metrics

This subject does not have any metrics.

Usage Notes

1. If Customer Care impersonates an administrator and changes an object, the change does not appear in the analysis if any fields from the User dimension are also used in the analysis.
2. Audit data is automatically purged according to the value of the Audit Expiry field. The Audit Trail dimension only has data that has not been purged. When data is purged, it is no longer available to appear in analyses.

Opportunities Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze opportunities by account, territory, campaign, contact, territory, owner, and date dimensions. This subject area is a multifact subject area that includes opportunity and quota metrics. Opportunity metrics are defined at the most granular level in this subject area, and hence, can be analyzed by every possible dimension. However, Quota metrics are at less granular level and can be analyzed only by limited dimensions including Date (Month), Quota, Owner.

Relationship Type

Simple

Dimensions

- Account
- Account Territory
- Campaign
- Close Date
- Date Opened
- Opportunity
- Owned By User
- Primary Contact
- Principal Partner Account
- Quota
- Territory

Metrics

The following are the key metrics in this subject area:

- Revenue (Expected and Closed)
- Number (#) of Opportunities (Open and Closed)
- Number (#) of Wins
- Quota amounts

The complete list of metrics for this subject area is as follows:

- Opportunity Metrics
  - Opportunity Custom Metrics

    - Indexed Currency
    - Average (Avg) Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Number
  - Revenue
  - Expected Revenue
  - Closed Revenue
  - Revenue (000)
  - Expected Revenue (000)
  - Closed Revenue (000)
  - Number (#) of Opportunities
  - Number (#) of Open Opportunities
  - Number (#) of Closed Opportunities
  - Number (#) of Wins
  - Average Number (Avg #) of Days in Stage
- Quota Metrics
  - Quota Value

Usage Notes

Because quota metrics are not defined at the Opportunity dimension level, these metrics are displayed as empty cells when Opportunity dimension attributes are on the report.

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

The Opportunities Reporting subject area and the Opportunity Historical Analytic subject area provide different metrics. Before selecting one of these subject areas, review the provided metrics in both to make sure you use the subject area that best suits your needs,

Opportunities and Competitors Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze the many-to-many relationship between opportunities and competitor accounts. This subject area is almost identical to the opportunity subject areas. The only difference is that it includes the competitor account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports to show all the competitors for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and competitor accounts, the opportunities that do not have an association with at least one competitor account cannot be reported using this subject area. The attributes that define the competitor account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths

- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Close Date
- Date Closed
- Opportunity
- Opportunity Competitor
- Owned By User
- Primary Contact
- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Metrics
  - Opportunity Custom Metrics
    - Indexed Currency
    - Average (Avg) Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Number
  - Revenue
  - Expected Revenue
  - Closed Revenue
  - Revenue (000)
  - Expected Revenue (000)
  - Closed Revenue (000)
  - Number (#) of Opportunities
  - Number (#) of Open Opportunities
  - Number (#) of Closed Opportunities
  - Number (#) of Wins
  - Average Number (Avg #) of Days in Stage

Usage Notes

The Account dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Relationship Contact Dimension

Opportunities can be linked to an opportunity as competitors. Any opportunities that are linked to an opportunity as competitors are listed in the Opportunity Competitors related information section of the Opportunity Detail page. The relationship between two opportunities that are linked in this way can also have a primary contact that is different from the primary contacts on the linked opportunities.

To extract information about the primary contact for the relationship between the opportunities, select the columns from the Relationship Contact dimension. To extract information about the primary contact for the opportunity, select the columns from the Primary Contact folder under the Opportunity dimension. To extract information about the primary contact on a competitor, select the columns from the Primary Contact folder under the Opportunity Competitor dimension.

Opportunities and Partners Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows you to analyze the many-to-many relationship between opportunities and partner accounts. It is almost identical to the opportunity subject areas. The only difference is that it includes the partner account dimension, which has a many-to-many relationship with the opportunity record type. This subject area allows you to create reports that show all the partners for an opportunity. Because this subject area represents the many-to-many relationship between opportunities and partner accounts, the opportunities that do not have an association with at least one partner account cannot be reported using this subject area. The attributes that define the partner account relationship that are available for reporting include the following:

- Primary Contact
- Role
- Reverse Role
- Start Date
- End Date
- Strengths
- Weaknesses
- Comments

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Close Date
- Date Opened
- Opportunity
- Opportunity Partner
- Owned By User
- Primary Contact
- Relationship Contact
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Metrics
  - Opportunity Custom Metrics
    - Indexed Currency
    - Average (Avg) Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Number
  - Revenue
  - Expected Revenue
  - Closed Revenue
  - Revenue (000)
  - Expected Revenue (000)
  - Closed Revenue (000)
  - Number (#) of Opportunities
  - Number (#) of Open Opportunities
  - Number (#) of Closed Opportunities
  - Number (#) of Wins
  - Average Number (Avg #) of Days in Stage

Usage Notes

The Account and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Relationship Contact Dimension

Opportunities can be linked to an opportunity as partners. Any opportunities that are linked to an opportunity as partners are listed in the Opportunity Partners related information section of the Opportunity Detail page. The relationship between two opportunities that are linked in this way can also have a primary contact that is different from the primary contacts on the linked opportunities.

To extract information about the primary contact for the relationship between the opportunities, select the columns from the Relationship Contact dimension. To extract information about the primary contact for the opportunity, select the columns from the Primary Contact folder under the Opportunity dimension. To extract information about the primary contact on a partner, select the columns from the Primary Contact folder under the Opportunity Partner dimension.

Opportunity Contacts Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

You can use this subject area to report on all contacts associated with an opportunity or a contact that is associated with multiple opportunities. In other opportunity subject areas, you can report only on an opportunity's primary contact.

Relationship Type

Many-to-Many

Dimensions

This subject area offers the following dimensions:

- Contact
- Opportunity

Metrics

- Opportunity Contact Metrics
  - Number (#) of Opportunity Contacts

Usage Notes

None

Opportunity Product Revenues Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand

Business Purpose

This subject area allows you to analyze opportunity product revenues by account, account territory, campaign, opportunity, opportunity product, owned by user, product, and product category. Because each recurring product revenue record might have a different start date, the level of detail for this subject area is at the lowest level and contains one row for each recurring product revenue record within the opportunity. Given the level of detail for this subject area, it provides the utmost flexibility to roll up data at any level of the supported dimensions. This subject area also contains the quota dimension and metrics, which allow you to report both opportunity product revenue and quota metrics in the same report.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Account Territory
- Campaign
- Opportunity
- Opportunity Product Revenue
- Owned By User
- Primary Contact
- Product
- Product Category
- Quota

Metrics

The complete list of metrics for this subject area is as follows:

- Opportunity Product Revenue Metrics
  - Number (#) of Products
  - Average (Avg) Number (#) of Products
- Quota Metrics
  - Quota Value

Usage Notes

The Account and Primary Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Reports made with this subject area include a summary revenue record row for each revenue record displayed in the report. If you do not want the summary revenue record rows included in the report, then either add the Product Name field to the report or use the Opportunity Historical Analytics Subject Area (on page 876).

Opportunity Team Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the relationship between opportunities and opportunity teams. Use this subject area to query for team members involved in an opportunity.

Relationship Type

Many-to-Many.

Dimensions

This subject area offers the following dimensions:

- Account
- Close Date
- Date Opened
- Opportunity
- Opportunity Team
- Team Member

Metrics

- Opportunity Team
  - Opportunity Team Optimized Custom Metrics
  - Number (#) of Opportunity Team Members

Usage Notes

Data Visibility. This subject area always uses the Team Visibility mode, regardless of which settings you defined in your profile. For that reason, you can always report on all the opportunities where you are either the owner or a team member.

Orders Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

Use this subject area to analyze orders by account, contact, date, opportunity, owner, and product dimensions.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Date
- Opportunity
- Order
- Owned By User
- Product

Metrics

The complete list of metrics for this subject area is as follows:

- Number (#) of Orders
- Order Items Quantity

Usage Notes

This subject area has multiple dimensions, but you must take care not to mix dimensions indiscriminately. Not all combinations of dimensions and metrics yield useful results.

- The metric ‘Number (#) of Orders’ applies only to the Order dimension which can be rolled up by direct relationship (Account, Contact, Date, Opportunity, and Owner dimensions) but not by the Product dimension, because there is no direct relationship between the Product and Order dimensions.
- The Product dimension is only associated with Order Item, you can still report Product with Order details through the Order dimension.

Partners Real-Time Reporting Subject Area

Availability

This subject area is available only in Oracle CRM On Demand Partner Relationship Management Edition.

Business Purpose

The Partners Reporting subject area provides the ability to analyze partners and measure important performance metrics, including the number of qualified leads and total revenue in the opportunity pipeline.

Relationship Type

Summary

Dimensions

This subject area has the following dimensions:

- Date Created
- Owned By User
- Partner
- Territory

Metrics

The complete list of metrics for this subject area is as follows:

- Partner Metrics
- Partner Custom Metrics
  - Average (Avg) Indexed Currency
  - Average (Avg) Indexed Number

- Indexed Currency
- Indexed Number

- Number (#) of Partners
- Number (#) of Archived Leads
- Number (#) of Cancelled Service Requests (SRs)
- Number (#) of Closed Opportunities
- Number (#) of Closed SRs
- Number (#) of Leads
- Number (#) of Leads Converted to Opportunities
- Number (#) of Leads Resulting in Lost Opportunity
- Number (#) of Leads Resulting in Won Opportunity
- Number (#) of Open Opportunities
- Number (#) of Open SRs
- Number (#) of Opportunities
- Number (#) of Pending SRs
- Number (#) of Qualified Leads
- Number (#) of Rejected Leads
- Number (#) of SRs
- Number (#) of Wins
- Average Number (Avg #) of Days in Stage
- Average (Avg) Days to Close SR
- Average (Avg) Open SR Age
- Closed Revenue
- Closed Revenue (000)
- Closed Revenue for Lead
- Expected Revenue for Lead
- Opportunity Revenue for Lead
- Revenue
- Revenue (000)

Usage Notes

The previous metrics are based on the Principal Partner Account of Leads, Opportunities, and Service Requests.

Personalized Content Delivery Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the information required by various roles in a pharmaceutical organization to better understand physicians, refine content, and deliver the right message to the right person at the right time. For example, a marketing manager can analyze detailing trends, collateral performance, and responses from various segments. With this information, the manager can revise collateral or segment the customer base again, and then target customers accordingly. A sales manager can analyze the detailing trends, looking for good and bad performers in a territory, and so coach the team, as needed.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Contact
- Message Response
- Messaging Plan
- Messaging Plan Item
- Product

Metrics

The complete list of metrics for this subject area is as follows:

- Account Metrics
  - Number (#) of Accounts
- Activity Metrics
  - Number (#) of Accounts with Activities
  - Number (#) of Activities
  - Number (#) of Closed Activities
  - Number (#) of Open Activities
- Contact Metrics
  - Contact Custom Metrics
    - Average (Avg) Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Currency
    - Indexed Number
  - Number (#) of Contacts
- Message Response Metrics
  - Messaging Response Custom Metrics
    - Average (Avg) Indexed Currency
    - Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Number
  - Number (#) of Messaging Responses
  - Average (Avg) Sequence Number
- Messaging Plan Item Metrics
  - Messaging Plan Item Custom Metrics
    - Average (Avg) Indexed Currency
    - Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Number
  - Number (#) of Messaging Plan Items

  - Average (Avg) Sequence Number
- Messaging Plan Metrics
  - Messaging Plan Custom Metrics
    - Average (Avg) Indexed Currency
    - Indexed Currency
    - Average (Avg) Indexed Number
    - Indexed Number
  - Number (#) of Messaging Plans

Usage Notes

The Activity dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

This subject area has multiple dimensions, but not all combinations are valid. For the combinations that are invalid, an error is returned. For example, the following combinations are invalid and will produce an error:

Dimension	Dimension	Dimension
Product	Account	Message Plan
Product	Account	Message Plan Item
Product	Account	Message Response
Product	Activity	Message Plan
Product	Activity	Message Plan Item
Product	Activity	Message Response
Product	Contact	Message Plan
Product	Contact	Message Plan Item
Product	Contact	Message Response

If your visibility is Team Visibility, and your analysis includes the Messaging Plan, Messaging Plan Item, or Message Response dimensions, then Manager Visibility is applied.

Quotes Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand. The Quotes object must be provisioned by an administrator.

Business Purpose

Use this subject area to analyze quotes by account, date, and owner dimensions.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Date
- Opportunity
- Owned By User
- Quote

Metrics

The complete list of metrics for this subject area is as follows:

- Quote Custom Metrics
- Number (#) of Quotes

Usage Notes

None.

Service Request Team Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area allows the reporting of the many-to-many relationship between service requests and team users. Because it is possible to associate a service request with various team members in Oracle CRM On Demand, you can use this subject area to create a list of all team members associated with a service request or all service requests where a user is added as a team member. You cannot use this subject area to report on service requests that are not associated with any user or to report on users not linked to a service request.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Date Closed
- Date Opened
- Service Request
- Service Request Team
- Team Member

Metrics

- Service Request Team
  - Service Request Team Optimized Custom Metrics
  - Number (#) of Service Request Team Members

Usage Notes

The Service Request dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

In the Service Request Team Optimized Custom Fields folder for the Service Request Team dimension, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available:

- Check Box
- Date
- Date/Time
- Percent
- Phone
- Picklist
- Text (Long)
- Text (Short)

In the Service Request Team Optimized Custom Metrics folder, the first five custom fields (that is, the first five fields that were created) of each of the following field types are available as metrics:

- Currency
- Integer
- Number

Data Visibility. This subject area always uses the Team Visibility mode, regardless of which settings are defined in your profile or in the company profile. For that reason, you can always report on all the service requests where you are either the owner or a team member.

Service Requests Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyze service requests by account, asset, contact, service request, user, partner, and date dimensions. It helps you to measure and analyze important performance metrics of the customer service request organization, including how long service requests have been open and the average duration to close them. Using these performance metrics for service requests can help your company to improve customer satisfaction, employee productivity, and reduce operational costs.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Asset
- Contact
- Date Closed
- Date Opened
- Opportunity
- Owned By User
- Principal Partner Account (available only in Oracle CRM On Demand Partner Relationship Management Edition)
- Service Request

Metrics

The complete list of metrics for this subject area is as follows:

- Service Request Metrics
  - Service Request Custom Metrics
    - Indexed Currency
    - Average (Avg) Indexed Currency
    - Indexed Number
    - Average (Avg) Indexed Number
  - Number (#) of Service Requests (SRs)
  - Number (#) of Open SRs
  - Number (#) of Closed SRs
  - Number (#) of Pending SRs
  - Number (#) of Cancelled SRs
  - Average (Avg) Open SR Age
  - Average (Avg) Days to Close SR

Usage Notes

- The Account, Asset, Contact, and Service Request dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.
- Use the Opportunity dimension to analyze metrics and attributes in the opportunity to service request relationship.

Shared Activities Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyze shared activities by account, contact, and user dimensions. Because these activities can be shared by one or more users in Oracle CRM On Demand, using this subject area you can report shared activities. Activities that are owned or shared with at least one user can be reported using this subject area.

Relationship Type

Many-to-many

Dimensions

This subject area has the following dimensions:

- Account
- Activity
- Contact
- Owned By User

Metrics

- Activity Metrics
  - Number (#) of Activities

Usage Notes

The Account, Activity, and Contact dimensions include a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

The data visibility to the activity record is not controlled through the book association with that activity record in this subject area. You must own the activity record, or it must be shared with you so that you can see activity records in this subject area.

Solutions Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

In this subject area, you can analyze solutions by product, product category, service request, and expiration date dimensions, as well as the relationship between solutions and their associated service requests. You can also analyze important solution and related service requests metrics that help your company to evaluate the status and effectiveness of solutions.

Relationship Type

Many-to-Many

Dimensions

This subject area has the following dimensions:

- Expiration Date
- Product
- Product Category
- Service Request
- Solution

Metrics

The complete list of metrics for this subject area is as follows:

- Solution Custom Metrics
  - Average (Avg) Indexed Currency
  - Average (Avg) Indexed Number
  - Indexed Currency
  - Indexed Number
- Number (#) of Solutions
- Number (#) of Approved Solutions
- Number (#) of Published Solutions
- Number (#) of Obsolete Solutions
- Number (#) of SRs
- Number (#) of Open SRs
- Number (#) of Closed SRs

Usage Notes

The Product Category dimension is an independent dimension, not driven through product as are other subject areas. This is specifically done to match the special behavior of the Solutions user interface where a product category can be assigned to a solution without a product value.

The Service Request dimension includes a Book hierarchy, which enables you to analyze metrics and related attributes at any level.

Special Pricing Products Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

Special pricing requests allow partners and brand owners to execute a set of business processes, by which a partner asks the brand owner for a lower price on a product (for various reasons, such as a response to a competitive deal or general downward price trends).

This subject area provides you with the ability to perform real-time analysis and report on special pricing requests and special pricing products, so you can assess partner performance. You can use metrics and information, such as authorized price reductions for each product, partner, and quarter to measure discount effectiveness and product performance in the channel.

Relationship Type

Simple

Dimensions

This subject area offers the following dimensions:

- Date
- Deal Registration
- End Customer (Account)
- Last Approved by (User)
- Opportunity
- Owned By User
- Principal Partner Account
- Product
- Product Category
- Special Pricing Request

Metrics

The complete list of metrics for this subject area is as follows:

- Special Pricing Product Metrics
  - Number of (#) of Special Pricing Requests
  - Amount Authorized
  - Amount Authorized (000)
  - Amount Requested
  - Amount Requested (000)
  - Average (Avg) Amount Authorized
  - Average (Avg) Amount Requested
  - Average (Avg) Authorized Cost
  - Average (Avg) Authorized Discount Percent
  - Average (Avg) MSRP
  - Average (Avg) Purchase Cost
  - Average (Avg) Quantity
  - Average (Avg) Requested Cost
  - Average (Avg) Requested Discount Percent
  - Average (Avg) Requested Resale Price

  - Average (Avg) Suggested Resale Price
  - Quantity

Usage Notes

The End Customer dimension is the Account dimension. The Last Approved by dimension is the User dimension.

Vehicles Real-Time Reporting Subject Area

Availability

This subject area is available in all editions of Oracle CRM On Demand.

Business Purpose

This subject area provides the ability to analyze vehicle-related metrics by vehicle and dealer dimensions and other associated dimension objects, such as account, contact, date, dealer, and product.

Relationship Type

Simple

Dimensions

This subject area has the following dimensions:

- Account
- Contact
- Date
- Dealer
- Product
- Vehicle

Metrics

The complete list of metrics for this subject area is as follows:

- Vehicle Metrics
  - Vehicle Custom Metrics
  - Number (#) of Vehicles

Usage Notes

None

Using Optimized Filtering Fields

Optimized fields end with the words *Code* (for picklists and optimized picklists) or *UTC (*Coordinated Universal Time) for date-time fields. Using the optimized field in the filter improves report performance.

Code Fields in Filters

Code fields store picklist values in language independent code (LIC) for multilanguage picklists. In Oracle CRM On Demand, you manage multiple languages by using language independent codes and individual entries for each language. For example, a status field might be implemented as follows for the language value with a status of Active.

Language	Value	Language Independent Code
English	Active	Active

French	Actif	Active
German	Aktiv	Active
Spanish	Activo	Active

To filter active accounts, you create a filter for the Status Code field (the optimized version of the Status field) and for the LIC value (in this case, Active). No matter which language you use, querying for the LIC value improves report performance because an extra translation step is not required to query other languages.

Displaying the LIC Values for a Picklist

To display the LIC values for a picklist, use the following procedure.

To display the LIC values for a picklist

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Types Setup section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Setup.
5. On the Fields page, click one of the Edit Picklist links for the picklist field that you want.

   The LIC values are in the Id column.

UTC Fields in Filters

When you use UTC fields, they are not converted to company or user time zones and so they improve report performance. Performance is further improved when the date-time fields are indexed in the database. You can suppress these fields in your reports and use the fields that have adjusted time zones instead.

About Hierarchies

Some data objects, such as account, book, opportunity, and territory, support a hierarchical (tree) structure. For example, the territory hierarchy appears in multiple subject areas and is usually used to store sales territory information. Oracle CRM On Demand supports nine levels of hierarchy, including the top level. For example, a territory hierarchy implemented for a company in the United States might have this kind of structure:

- Top Level is set to USA.
- Level 8 has the following entries: Northeast, South, Midwest, and West.
- Level 7 has subentries, for example, the Northeast territory has: Maine, New Hampshire, Vermont, Massachusetts, Rhode Island, and Connecticut.
- Level 6 has more subentries. For example, the Massachusetts entry has: Boston, Cape Cod, Eastern Massachusetts, and Western Massachusetts.
- Level 5 divides the previous territories further. For example, the Cape Cod territory has: Lower Cape, Outer Cape, Hyannis, and Barnstable.
- Level 4 is not used in this example.
- Level 3 is not used in this example.
- Level 2 is not used in this example.
- Level 1 is not used in this example.

The previous hierarchy is more compressed, as shown in the following table. The maximum number of hierarchy levels that is supported is nine. So, if a hierarchy has fewer than nine levels, then the lowest-level values are repeated for those levels (Hyannis for Level 5 through Level 1). This feature enables you to report your related metrics at any level of the hierarchy.

Top Level Territory Name	USA
Level 8 Territory Name	Northeast
Level 7 Territory Name	Massachusetts
Level 6 Territory Name	Cape Cod
Level 5 Territory Name	Hyannis
Level 4 Territory Name	Hyannis
Level 3 Territory Name	Hyannis
Level 2 Territory Name	Hyannis
Level 1 Territory Name	Hyannis

In the user interface, the hierarchy attributes are in a subfolder under the main dimension folder, such as account, territory, and so on. All entries are displayed in alphabetical order.

NOTE: When you use information from a hierarchy in an analysis, the information is based on historical data, which is compiled nightly. Even if the analysis is created for a real-time reporting subject area, the information is not based on real-time data.

Book Hierarchy Support in Analytics

In many subject areas, one or more of the dimensions includes a Book hierarchy. In dimensions where the Book hierarchy is supported, you can analyze metrics and related attributes at any level of the book hierarchy. The maximum number of hierarchy levels that is supported for Analytics is nine, that is, eight sublevel books and the top-level book.

The following table lists the dimensions that include the Book hierarchy in the historical analytics subject areas.

Historical Analytics Subject Area	Dimensions with Book Hierarchy
Account Addresses	Account
Account and Competitor History	Account, Campaign
Account and Partner History	Account, Campaign
Account and Related Account History	Account, Campaign
Account Contact History	Account, Contact
Account Hierarchy	None
Account History	Account, Campaign

Historical Analytics Subject Area	Dimensions with Book Hierarchy
Account Team History	Account
Activity History	Account, Activity, Campaign, Contact, Lead, Opportunity, Service Request
Advanced Custom Objects History	Account, Activity, Campaign, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Lead, Opportunity, Service Request
Asset History	Account, Asset, Opportunity
Call Activity History	Account, Campaign, Contact, Opportunity
Campaign History	Campaign
Campaign Response History	Account, Campaign
Contact Addresses	Contact
Contact History	Account, Campaign, Contact
Contact Interests History	Contact
Contact Revenue History	Contact
Contact Team History	Account, Contact
Deal Registration History	Associated Contact (based on Contact), Associated Opportunity (based on Opportunity)
Deal Registration Product Revenue History	Associated Opportunity (based on Opportunity)
Dealer History	None
Event History	Account, Event, Lead, Opportunity
Household History	Contact
Lead History	Account, Campaign, Contact, Lead, Opportunity
Lead Team History	Account, Lead
MDF Request History	Campaign
Opportunity and Competitor History	Account, Campaign, Opportunity, Primary Contact (based on Contact)

Historical Analytics Subject Area	Dimensions with Book Hierarchy
Opportunity and Partner History	Account, Campaign, Opportunity, Primary Contact (based on Contact)
Opportunity Contact History	Contact, Opportunity
Opportunity History	Account, Campaign, Opportunity, Primary Contact (based on Contact)
Opportunity Product Revenue History	Account, Campaign, Opportunity, Primary Contact (based on Contact)
Opportunity Team History	Account, Opportunity
Partner History	None
Personalized Content Delivery History	Account, Activity, Contact
Pipeline History	Account, Opportunity
Portfolio History	Contact, Institution (based on Account)
Product History	Account, Opportunity
Quote History	Account, Opportunity
Sales Stage History	Account, Opportunity
Service Request History	Account, Asset, Contact, Opportunity, Service Request
Service Request Team History	Account, Service Request
Shared Activity History	Account, Activity, Contact
Shared Address History	Account, Contact
Solution History	Service Request
Special Pricing Product History	Opportunity
Usage Tracking Analysis	None

The following table lists the dimensions that include the Book hierarchy in the real-time reporting subject areas.

Real-Time Reporting Subject Area	Dimensions with Book Hierarchy
Account Contacts	Account, Contact

Real-Time Reporting Subject Area	Dimensions with Book Hierarchy
Account Revenues	Account, Campaign
Account Team	Account
Accounts	Account, Campaign
Accounts and Competitors	Account, Campaign
Accounts and Partners	Account, Campaign
Accounts and Related Accounts	Account, Campaign
Activities	Account, Activity, Campaign, Contact, Lead, Opportunity, Service Request
Advanced Custom Objects	Account, Activity, Campaign, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Financial Account, Financial Plan, Lead, Opportunity, Service Request
Assessments	Activity, Lead, Opportunity, Service Request
Assets	Account, Asset, Opportunity
Books	Book
Business Plans	Activity, Book, Custom Object 01, Custom Object 02, Custom Object 03, Lead, Opportunity, Service Request
Campaigns	Campaign
Contact Relationships	Account, Contact
Contact Team	Account, Contact
Contacts	Account, Campaign, Contact
Custom Object 01 and Accounts	Account, Campaign, Custom Object 01
Custom Object 01 and Contacts	Account, Campaign, Contact, Custom Object 01
Custom Object 01 and Opportunities	Account, Campaign, Custom Object 01, Opportunity, Primary Contact (based on Contact)
Custom Object 01 and Service Requests	Account, Contact, Custom Object 01, Service Request

Real-Time Reporting Subject Area	Dimensions with Book Hierarchy
Custom Object 02 and Accounts	Account, Campaign, Custom Object 02
Custom Object 02 and Contacts	Account, Campaign, Contact, Custom Object 02
Custom Object 02 and Opportunities	Account, Campaign, Custom Object 02, Opportunity, Primary Contact (based on Contact)
Custom Object 02 and Service Requests	Account, Contact, Custom Object 02, Service Request
Custom Object 03 and Accounts	Account, Campaign, Custom Object 03
Custom Object 03 and Contacts	Account, Campaign, Contact, Custom Object 03
Custom Object 03 and Opportunities	Account, Campaign, Custom Object 03, Opportunity, Primary Contact (based on Contact)
Custom Object 03 and Service Requests	Account, Contact, Custom Object 03, Service Request
Custom Objects 01	Account, Activity, Campaign, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Lead, Opportunity, Service Request
Custom Objects 02	Account, Activity, Campaign, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Lead, Opportunity, Service Request
Custom Objects 03	Account, Activity, Campaign, Contact, Custom Object 01, Custom Object 02, Custom Object 03, Lead, Opportunity, Service Request
Events	Account, Event, Invitees (based on Contact), Lead, Opportunity
Forecasts	Account, Book, Contact, Opportunity
Households	Contact
Lead Team	Account, Lead
Leads	Account, Campaign, Contact, Lead, Opportunity
Master Audit Trail	None
Opportunities	Account, Campaign, Opportunity, Primary Contact (based on Contact)

Real-Time Reporting Subject Area	Dimensions with Book Hierarchy
Opportunities and Competitors	Account, Campaign, Opportunity, Primary Contact (based on Contact)
Opportunities and Partners	Account, Campaign, Opportunity, Primary Contact (based on Contact)
Opportunity Contacts	Contact, Opportunity
Opportunity Product Revenues	Account, Campaign, Opportunity, Primary Contact (based on Contact)
Opportunity Team	Account, Opportunity
Orders	Account, Contact, Opportunity
Partners	None
Personalized Content Delivery	Activity
Quotes	Account, Opportunity
Service Request Team	Account, Service Request
Service Requests	Account, Asset, Contact, Opportunity, Service Request
Shared Activities	Account, Activity, Contact
Solutions	Service Request
Special Pricing Products	End Customer (based on Account), Opportunity
Vehicles	Account, Contact

Working with Analytics in a Separate Browser Window

If your user role has the Manage Custom Reports privilege, then you can open a browser window that is separate from your main Oracle CRM On Demand browser window, and work with your analyses in the new window. Working in a separate browser window is particularly useful when you are working with a large analysis that has many columns and rows, because in the pages where the horizontal scroll bar, the Catalog pane, and the View pane appear, they are always visible. You do not need to scroll down the page to access them.

To work with analytics in a separate browser window

- In your Oracle CRM On Demand browser window, in the Analytics tab, click Open Analytics in New Window.

When working in a separate browser window, note the following points:

- If an analysis is open in both your main Oracle CRM On Demand browser window and in a separate browser window, and if you edit and save the analysis in the separate browser window, then the analysis is not refreshed automatically in the main window. You must refresh the analysis to see the changes.
- The book selector is not available in the separate browser window. If you want to select a book for the analysis, then you must select the book in the main Oracle CRM On Demand browser window.
- If you drill down on an action link in an analysis in a separate browser window, then the record opens in the main Oracle CRM On Demand window.
- If your Oracle CRM On Demand session times out in either of the windows, then the session also times out in the other window.

Applying Cosmetic Formatting in Analyses and Dashboards

Cosmetic formatting affects the visual appearance of data in columns and views in analyses, and in columns and sections on dashboard pages.

You can apply cosmetic formatting, copy and paste cosmetic formatting attributes, and save a formatted analysis to use with the columns of another analysis. You can display various dialog boxes that provide access to and control over various cosmetic attributes. Depending on the object that you are formatting, the dialog box displays different options, such as font, cell, and border controls, background color, additional formatting options such as cell padding, and custom CSS style options for HTML.

You can copy the range of cosmetic formatting attributes that you apply to an item, such as a column in a table, and paste them to an item of the same type, such as another column in the table or a column in a different table. You can also restore the default formatting. To do this, use the icons at the top left of the dialog boxes.

After you customize the cosmetic appearance of an analysis and save it, you can use it as a template. This allows you to apply the formatting from the saved analysis to new or existing analyses. Views that support the use of a saved analysis as a template include the Legend, Narrative, Table, Pivot Table, Trellis, Static Text, Title, and View Selector views.

This topic contains information about performing the following tasks:

- Applying cosmetic formatting
- Restoring the default appearance of an attribute
- Using a saved analysis as a template

To apply cosmetic formatting

1. Open the cosmetic formatting dialog box for the item that you want to format.

   For example, to apply cosmetic formatting to a column in an analysis, do the following:

   - In the Criteria tab of the analysis editor, in the drop-down list of options for the column that you want to format, select Column Properties.
   - In the Column Properties dialog box, click the Style tab.

2. In the Font area, make your selections for the font family, size, color, style (such as bold), and any effects that you want to apply (such as underlining).

   NOTE: For some items, this option is not available.

3. In the Cell area, set up the alignment and background color.

   NOTE: For horizontal alignment, the most common justification for text data is left. For numeric data, the most common justification is right.

   Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

4. In the Border area, make your selections for the border position, color, and style of the cell.

TIP: You can select or deselect custom borders by clicking the top, bottom, left, and right borders near the Position drop-down list.

5. To format spacing within the cell, click Additional Formatting Options and specify values for the width and height of the cell contents, and the space above, below, left and right of the contents.

   Values are specified in pixels.

6. To override the style and class elements specified in Oracle CRM On Demand style sheets, make your selections in the Custom CSS Style Options area:

   a. Click the settings that you want to use.

   b. Provide the location of the class, style, or style sheet.

   NOTE: The advanced style formatting options are for users who know how to work with cascading style sheets.

7. Click OK.

To restore the default formatting

- Open the cosmetic formatting dialog box for the item, and then click the Clear Cell Format icon.

For some types of views, when you add the view, you can use a saved analysis as a template, as described in the following procedure.

To use a saved analysis as a template

1. In the Results tab, click the icon for Import formatting from another analysis.
2. In the Select Analysis dialog, navigate to an analysis and click OK.

   The formatting is applied to the current analysis.

Step 1: Defining Criteria in Analytics

You define the criteria for your reports in the Criteria tab. To access the Criteria tab, either create a new analysis, or edit an existing analysis from the catalog.

Click a topic to see step-by-step instructions to do the following:

- Adding Columns to Analyses (on page 976)
- Adding Filters to Columns in Analytics (on page 976) (optional but recommended)
- Editing Column Properties (on page 983)
- Setting Up Column Formulas (on page 992)
- Adding Action Links to Analyses (on page 993) (optional)
- Sorting and Reordering Columns (on page 996)

Related Topics

See the following topics for related information:

- About Using Addresses in Reports (on page 823)
- Combining Multiple Subject Areas in a Single Analysis (on page 996)
- Combining Analyses Using Set Operations (on page 999)
- Viewing SQL Code in the Advanced Tab in Analytics (on page 1047)

Adding Columns to Analyses

When creating or modifying an analysis, you add columns until your analysis contains all the data that you want. You can add columns to an analysis in the Criteria tab of the analysis editor and in the Results tab. This topic describes how to add columns in the Criteria tab.

NOTE: The periods in your analyses might be based on your company's fiscal calendar, which might be different from a standard calendar. For example, your company's fiscal year might begin on 1 June of each calendar year. If your company has recently changed its fiscal calendar year in Oracle CRM On Demand, then you must review historical analyses carefully if they span multiple years. Data in reports that is based on your previous fiscal calendar cannot be aligned with data using a new fiscal calendar.

About Excluding New Columns from Existing Views

If your analysis already contains views in the Results tab, then you might not want any new columns that you add to the analysis in the Criteria tab to be displayed in the existing views by default. You can configure the properties of the analysis so that the columns that you add to the criteria are excluded from the existing views.

NOTE: If you want to exclude the new columns from the existing views, then you must configure the analysis properties accordingly before you add the columns in the Criteria tab.

To specify whether new columns are to be displayed in existing views

1. In the Results tab or the Criteria tab of the analysis editor, click the Edit Analysis Properties icon in the toolbar.
2. In the Analysis Properties dialog box, click the Data tab.
3. In the Display of Columns Added in Criteria Tab field, select the option that you want:
   - **Display in existing and new views.** The columns that you add are displayed by default in existing views as well as in new views.
   - **Exclude from existing views, but display in new views.** The columns that you add are displayed by default in new views only. In existing views, the columns appear in the Excluded drop target in the view editors. For information about drop targets, see About Drop Targets in View Editors (on page 1005).
4. Click OK to close the dialog box.

To add columns to your analysis

1. In the Criteria tab of the analysis editor, in the Subject Areas pane, expand the column lists to display the columns that you can include in the analysis.
2. Double-click the columns that you want to include in the analysis.

   NOTE: You can remove a column from the report by selecting Delete from the drop-down list of options for that column.

You can add custom fields as columns in analyses. For multilanguage deployments, you must translate custom fields into each language that is used, so that those fields are available to be added to reports and analyses. For example, if a custom field is created in English, it must be translated in to German, so that a German user can see, and then use the custom field in an analysis.

Adding Filters to Columns in Analytics

In the Criteria tab, you can set up filters for columns in your report. A filter limits the results that appear when a report is run, showing only those results that match the criteria.

A column filter consists of the following elements:

- A column to filter, such as Account Type.

- A value to use when applying the filter, such as 10 (a SQL expression or a variable can be used instead of a value when necessary).
- An operator that determines how the value is applied, such as Less Than.

  For example, if the column contains the quantity sold, the operator is Less Than, and the value is 10, the results include only order quantities where less than 10 units were sold.

A column filter can also have the following characteristics:

- It can be combined with other column filters to further constrain the results of a report.
- Filters can be grouped to create complex filters.
- Its value can be constrained by the results of a previously saved report.
- A column filter applies only to the column in which it is built. It does not affect other columns.

The filter is translated into a WHERE clause in the SQL SELECT statement. The WHERE clause is used to limit the rows returned to those that fit the specified constraints. Advanced users can enter the SQL for a filter directly.

NOTE: If you selected the option to add new picklist values when importing data, those new picklist values may not show up in the reports for 24 hours. Therefore, you may not be able to use the new picklist values as filters during that time period.

Creating Column Filters

To create a filter without adding the column to the report

- In the Filters pane, click Create a filter for the current Subject Area icon, select More Columns..., and then select the column from the Select Column dialog.

To create a column filter

1. In the Criteria tab, select the Filter option in the column where you want to create the filter.
2. In the New Filter dialog box, select an operator from the Operator drop-down list.

   Use the guidelines shown in the following table when choosing an operator and specifying values. For more information on operators, see *Usage Notes on Operators*, which appears after this procedure.

Operator	Usage Guidelines
is equal to or is in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column matches the value in the filter.
is not equal to or is not in	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column does not match the value in the filter.
is less than	Valid for a column that contains numbers or dates. Specify a single value. Results will include only records where the data in the column is less than the value in the filter.
is greater than	Valid for a column that contains numbers or dates. Specify a single value. Results will include only records where the data in the column is greater than the value in the filter.

Operator	Usage Guidelines
is less than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results will include only records where the data in the column is less than or the same as the value in the filter.
is greater than or equal to	Valid for a column that contains numbers or dates. Specify a single value or multiple values. Results will include only records where the data in the column is greater than or the same as the value in the filter.
is between	Valid for a column that contains numbers or dates. Specify two values. Results will include records for both the specified values and the values in between them.
is null	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the absence of data in the column. The results include only records where there is no data in the column. Sometimes it might be useful to know whether any data is present, and using the IS NULL operator is a way to test for that condition.
is not null	Valid for a column that contains text, numbers, or dates. Do not specify a value. The operator tests only for the presence of data in the column. Results will include only records where there is data in the column.
is in top	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only the first n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this operator to obtain a list of the top 10 performers.
is in bottom	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only the last n records, where n is a whole number specified as the value in the filter. This operator is for ranked results. For example, you could use this to obtain a list of the customers reporting the fewest numbers of problems.
contains all	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column contains all of the values in the filter.
contains any	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column contains at least one of the values in the filter.
does not contain	Valid for a column that contains text, numbers, or dates. Specify a single value or multiple values. Results will include only records where the data in the column does not contain any of the values in the filter.

Operator	Usage Guidelines
begins with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only records where the data in the column begins with the value in the filter.
ends with	Valid for a column that contains text, numbers, or dates. Specify a single value. Results will include only records where the data in the column ends with the value in the filter.
is LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percentage symbol (%) as a wild card character. You may specify up to two percent sign characters in the value. Results will include only records where the data in the column matches the pattern value in the filter.
is not LIKE (pattern match)	Valid for a column that contains text. Specify a single value or multiple values. Requires the use of a percentage symbol (%) as a wild card character. You may specify up to two percent sign characters in the value. Results will include only records where the data in the column does not match the pattern value in the filter.
is prompted	Valid for a column that contains text, numbers, or dates. Setting a column to *is prompted* flags it to be filtered by a value passed to it from another report. **NOTE:** Use this option when linking reports together through navigation (see Step 2: Reviewing Results and Creating Layouts (on page 1000)). One or more columns in the report you drill into must contain the *is prompted* filter for that report to display rows limited to the value selected and drilled into from the parent report.

3 Enter a value in the Value field.

The Value field has options for entering formulas, dates, variables, and so on. The following steps describe some of these options.

4 For date columns you can click the calendar icon to the right of the Value field and use the Select Date dialog box to specify a date.

5 For some columns you can select specific row to appear in the report by clicking the down arrow icon to the right of the Value field and then selecting the rows to include.

6 For some columns you can use the Search feature (click the search icon to the right of the Value field) and select specific values to include in the analysis. Move your selected values from the Available column into the Selected column using the arrow controls.

7 To add an SQL expression or a variable (session, repository, or presentation, do the following:

a Under the Value field click Add More Options and choose SQL Expression, Session Variable, Repository Variable, or Presentation Variable.

A new field appears under the Value field.

b Enter the SQL expression or variable name into the new field.

SQL expressions can contain function calls that operate on column values. For more information, see Using Functions in Analytics (on page 1047) and Session Variables in Analytics (on page 1079).

To remove a value, SQL expression, or session variable, click the X icon next to it.

8 To have this filter constrained by the value of a column in another analysis, see *Using Saved Reports as Filters* later in this topic.

9 To convert the filter to SQL, click the Convert this filter to SQL check box.

10 When you are finished, click OK.

The filter appears in the Filters area on the Criteria tab or in the Catalog.

Usage Notes on Operators

Some operators do similar, but not exactly the same functions. Consider the similarities and differences between the following operators:

- is equal to
- is in
- contains all
- contains any
- is LIKE

Is equal to or *is in* searches for an exact match between the search criteria and the values in the data base. For example, if the criterion is Pat Lee, then only Pat Lee exactly matches and passes the filter. Because all searches are case sensitive, values such as pat Lee or Pat lee do not pass the filter.

Contains all searches for all the values that match the criteria, and all the values must be in the values to pass the filter, as in an AND search. For example, if the criteria is to search for two values; value = Pat and value =Lee, then Pat Lee and Lee Pat pass the filter, but pat Lee, Pat Smith and Chris Lee do not pass the filter because they do not contain all of the criteria (Pat AND Lee).

Contains any searches for values that match the criteria, but is less strict in that it does not require all the values, as in an OR search. For example, if the criterion is to search for two values; value = Pat, and value = Lee then Pat, Pat Smith, Chris Lee, and Lee all pass the filter because they meet the criteria of Pat OR Lee.

Is LIKE searches for patterns, and as such requires the use of one or two percentage symbols (%) as a wild card character. For example, if the search criteria is value = P%t %ee, then Pat Lee, Pit smee, and Packet trainee all pass the filter, but pat Lee does not.

For optimum search speed, reduce or eliminate the use of pattern matching operators such as Contains All, Contains Any, and Is LIKE. If you want to search by exact values, do not use pattern matching operators instead of exact operators.

Saving Column Filters

You can save a filter as part of an analysis or for reuse in other analyses. If a filter is for a specific analysis and you save the analysis, the filter is saved as part of the analysis and will be applied every time the analysis runs. You can also save the filter explicitly so it can be used in other analyses.

Saved filters and folders containing filters for the subject area appear following the name of the subject area, where applicable.

To save a column filter as part of an analysis

1 In the Criteria tab, click Save.

2 In the Save As dialog box, select the location in which to save the analysis and then click OK.

To save a column filter for use in other analyses

1 In the Criteria tab, in the Filters section, click More options (>>) and then choose Save Filters.

2 In the Save As dialog box, select a folder in which to save the filter:

   - To save the filter for your personal use, click My Folders.

Filters saved in My Folders are available only to you.

- To save the filter for use by others, select the Company Wide Shared Folder.

  Filters saved in a public folder are available to other users that have permission to access the folder.

3. Enter a name (maximum 512 characters) for the filter.
4. (Optional) Enter a description for the filter.
5. Click OK.

To display the properties for a saved filter

- In the Criteria tab, in the Filters section, select the filter and click the View Saved Filter icon.

Applying Saved Column Filters to Analyses

You can apply a saved column filter to an analysis. You can apply either the contents of the filter or a reference to the filter.

When you apply the contents of a saved column filter, the actual contents of that filter are copied into the Filters area on the Criteria tab. This allows you to manipulate the filter criteria without altering the saved filter. When you apply a reference to a saved filter, the saved filter is referenced only by its name, and you can view but not alter its contents.

To apply a saved column filter to an analysis

1. In the Criteria tab, in the Catalog pane, navigate to the saved filter.
2. Select the saved filter and click the Add More Options icon at the top of the Catalog pane.

   The Apply Saved Filter dialog box opens.
3. Specify the filter options (Clear all existing filters before applying and Apply contents of filter instead of a reference to the filter) and then click OK.

   The filter appears in the Filters area on the Criteria tab.

Editing Column Filters

You can edit a column filter to change its properties.

To edit a column filter

1. In the Criteria tab, in the Filters section, hover over the Filter and when the menu appears click the Edit icon.

   The Edit Filter dialog box appears.
2. Make your changes, and then click OK.

Removing Column Filters

You can remove a single filter or all filters from an analysis.

NOTE: If the analysis was saved previously with any filters applied, you must save the analysis again to permanently remove the filters.

To delete a column filter from an analysis

- In the Criteria tab, in the Filters section, hover over the filter until the menu appears and then click the Delete icon.

Combining Column Filters with Other Column Filters

Combining column filters, also known as parenthetical filtering, allows you to create complex filters without requiring you to know SQL.

You can combine column filters with AND and OR operators. The AND operator means that the criteria specified in each filter must be met. This is the default method for combining column filters. The OR operator means that the criteria specified in at least one of the column filters must be met.

To combine a column filter with other column filters

1. In the Criteria tab, add at least two column filters to an analysis, or add at least two column filters to a saved filter.

   The filters are listed in the Filters section with an AND operator between them.
2. To change an AND operator to an OR operator, click it.
3. As you add column filters, click AND and OR operators to group filters and construct the desired filter combinations.

   Combined filters elements are bounded by boxes.
4. To duplicate, delete, or ungroup bounded elements, click the Edit Filter Group button and select the appropriate option.
5. To copy or paste filters, hover over the filter and choose Copy Filter or Paste Filter.

Preventing a Filter from Being Replaced During Navigation and Prompting

You can protect the contents of a filter in a report from being affected during navigation and prompting. A protected filter is always applied to results.

To protect a filter from changing during navigation and prompting

1. In the Criteria tab, in the Filters section, hover over the filter until the menu appears and click Edit Filter.
2. In the Edit Filter dialog box, check Protect Filter and click OK.

Using Saved Reports as Filters

Filters can be combined with other filters, as well as be based on the values returned by another report. Any saved report that returns a column of values can be used to filter the selected column in your report.

To create a filter based on the results of another saved report

1. In the Criteria tab, choose Filter in the column where you want to create the filter.
2. In the New Filter dialog box, pull down the Operator drop-down menu and choose "is based on results of another analysis".
3. In the Saved Analysis field, click Browse and navigate to the saved report.
4. In the Relationship drop-down menu choose an operator.
5. In the Use Values in Column field, select the column that is to be used for the filter.

   If the saved report contains a column name that matches the column where you are creating the filter, that column name appears first in the list of values in the Use Values in Column field. You can select a different column.
6. Click OK.

   The filter appears in the Filters section in the Criteria tab.

Editing the SQL for a Column Filter

You can edit the logical SQL WHERE clause to be used as a filter. While generally not necessary, this feature is available for users who need advanced filtering capability. For a comprehensive description of SQL syntax, see a third-party reference book on SQL, a reference manual on SQL from one of the database vendors, or an online reference site. For more general information about using SQL, see Using Functions in Analytics (on page 1047).

To edit the SQL generated for a column filter

1. In the Filters pane hover over the SQL-generated filter and click the Edit icon.
2. The Advanced SQL Filter dialog box opens.
3. Enter your modifications into the text box and then click OK.

   The filter appears in the Filters area on the Criteria tab. When you have chosen this option, editing the filter will always display the SQL that you entered.

Example: Identifying Customers with the Most Sales Volume

The following example reports data on the ten customers with the most sales volume in 2003.

```
"Close Date"."Calendar Year" = 2003
```

```
AND RANK("Opportunity Metrics"."Closed Revenue") <= 10
```

Editing Column Properties

You can edit properties for a column to control the appearance and layout of a column and its contents. You can also specify formatting to apply only if the contents of the column meet certain conditions. By default, your selections for a column apply only to the current report.

Editing the Appearance of Column Contents

The default appearance of column contents in results is based on cascading style sheets and XML message files. You can use the Style tab of the Column Properties dialog box to override several default settings, such as the font and font size to use. Your selections apply only to the contents of the column for the report with which you are working.

To edit the appearance of column contents

1. In the Criteria tab, pull down the menu for the desired field and choose Column Properties.
2. In the Column Properties dialog box, click the Style tab.
3. Make your choices for font, cell, border, image, and advanced style formatting options.

   For more information, see Formatting Column Content in this topic.
4. In the Data Format tab, you can control the way the data is displayed by selecting the Override Default Data Format check box.

   This option allows you to override the default display characteristics. The selections that you see vary based on the data type. For example, if the column contains numeric data, you can select how you want the numbers treated, such as percentages, month names, or dates. You can select the number of decimal places to display, how to display negative numbers, the number of digits to show, and the thousands separator to use. If your column contains text, you can select how to treat the text, such as plain text, HTML, or a link. Based on your selection, the Custom Text Format text box displays the applicable HTML string used to display the data.

   NOTE: If your user role does not include the Analytics Scripting privilege, then only the two plain text options are available for you to select.

   To use a custom format for text, select Custom Text Format from the Treat Text As drop-down list, and then enter the custom format. If your user role includes the Analytics Scripting privilege, then you can enter HTML calls that provide special formatting. You can also enter any valid HTML string, including JavaScript, VBScript, and so on.

   For example, the following example HTML sets the column width and height in tables and pivot tables. In the example, the text html enclosed in brackets ([html]) indicates to use HTML, and the At sign character (@) represents the dynamic contents of the column.

[html]@

If you do not know HTML, JavaScript, VBScript, and so on, you can consult a third-party reference.

To create a custom numeric format, you can use the number sign (#) to include significant digits, and the number zero (0) to include as many digits as specified, even if the number does not contain that detail. These are examples:

Specifying ##.# shows 12.34 as 12.3

Specifying ##.000 shows 12.34 as 12.340

5 Click OK when you are done.

Editing the Layout of Column Contents

Use the Column Format tab of the Column Properties dialog box to perform the following tasks:

- Specify whether the column should appear in results.

  Columns are usually visible in results by default. However, you may want to include a column in your report that you do not want displayed in results, such as a column used in creating a filter.
- Control the display of duplicate data such as repeating column values.

  The data in one column of a table may be repeated in relation to rows of data in other columns in the table. For example, if one column lists customer names and another column lists the regions those customers are in, the region data could be repeated for each customer row. You can select to display duplicate data only once, or display it for every row. Displaying repeating or duplicated data only once can make a table somewhat easier to read, and can make distinctions in that data more apparent.
- Use the Data Format tab to format results in a variety of ways.
- Use the Conditional Format tab to use functions and conditional expressions to format results conditionally.
- Use the Interaction tab to specify the interaction that should occur when users work with the results, such as drilling, navigation to another report using Action Links, or sending master-detail events,

Your selections apply only to the contents of the column for the report with which you are working.

To hide a column in results

1 In the Criteria tab, pull down the menu for the desired column and choose Column Properties.

2 In the Column Properties dialog box, click the Column Format tab.

3 Select the Hide check box, if it is not already selected.

To create custom table and column headings

1 In the Criteria tab, pull down the menu for the desired column and choose Column Properties.

If you have combined results from multiple analyses, then the Column Properties button is at the result-column level. For more information about combining analyses, see Combining Analyses Using Set Operations (on page 999).

2 In the Column Properties dialog box, click the Column Format tab.

3 In the Headings area, select the Custom Headings check box.

This allows you to change the heading text and the heading formatting.

4 To change the text of the table or column heading, enter a new heading into the appropriate text box.

The heading will be used in this report instead of the default heading.

5 To change the format of the table or column heading, click the Edit Format button next to the text box.

The Edit Format dialog box appears.

Make your choices for font, cell, border, and advanced style formatting options. For more information, see “Formatting Column Content” below.

To suppress duplicate data

1. In the Criteria tab, pull down the menu for the desired column and choose Column Properties.
2. In the Column Properties dialog box, click the Column Format tab.
3. In the Value Suppression area, select the appropriate option:
   - Select Suppress to display repeating data only once and suppress duplicate rows.
   - Select Repeat to display repeating data for every row.
   - Select Default to retain the default display characteristics.

To specify what happens when users click a value

1. In the Criteria tab, pull down the menu for the desired column and choose Column Properties.
2. In the Column Properties dialog box, click the Interaction tab.
3. To specify what should happen when users click a value, select the appropriate option in the Primary Interaction field:
   - **Default (Drill)**.Restores the default interaction.
   - **Drill.** Allows you to drill down, so that you can view more information.
   - **Action Links.** Specify action links to a target report or dashboard.
   - **Send Master-Detail Events**. Use the Specify Channel field to identify where to send the data.
   - **None.** Disables drilling or navigation.

Interactions are defined separately for a column heading and the data in a column.

Applying Conditional Formatting to the Column Contents

In tables and pivot tables, conditional formatting helps direct attention to a data element if it meets a certain condition. For example, you can show high revenue sales figures in a certain color, or display an image such as a trophy next to the name of each salesperson who exceeds revenue by a certain percent.

You do this by selecting one or more columns in the report to use, specifying the condition to meet, and then making selections for font, cell, border, and style sheet options to apply when the condition is met. The conditional formats can include colors, fonts, images, and so on, for the data and for the table cell that contains the data. The steps to specify a condition are very similar to those used to create filters.

You can add multiple conditions so that the data and the table cell are displayed in one of several formats, based upon the value of the data. For example, low revenue sales can be displayed in one color, and high revenue sales can be displayed in another color.

Several subtle conditional formatting differences exist between traditional tables and pivot tables. Conditional formats that format one column based on the value of another column are not reflected in a pivot table, but are reflected in a standard table. For example, setting the color of a region name based on the sales in that region has no effect in a pivot table. However, setting the color of the sales data based on the value of the sales data is reflected in a pivot table, as is setting the color of the region name based on the actual name; for example, displaying a value of Eastern Region in bold colored text.

NOTE: In pivot tables, conditions are evaluated against the values as calculated or aggregated by the pivot table. Conditional formatting is applied based on the underlying value, even if you select the Show As options to show the data as percents or indexes.

Your selections apply only to the contents of the column for the report with which you are working.

To add conditional formatting to a column in a report

1. In the Criteria tab, pull down the menu for the desired column and choose Column Properties.
2. In the Column Properties dialog box, click the Conditional Format tab.

3. Click Add Condition and select the desired column in the report for use in constructing the condition.

   The New Condition dialog box opens.
4. Select the operator and value for the condition.
5. Click OK to close the New Condition dialog box.

   The Edit Format dialog box opens.
6. Make your choices for font, cell, border, image, and advanced style-formatting options.

   For more information, see Formatting Column Content in this topic.

   NOTE: If you specify an image as part of the conditional formatting, it appears conditionally in the results.
7. Click OK when you are done to return to the Column Properties dialog box.

   The Column Properties dialog box shows the condition, and the conditional formatting to apply.

   Conditions are evaluated in the order that they are listed and the last condition that gets evaluated to true determines which formatting is applied.

   - To reorder a column, click the Move Up or Move Down buttons.
   - To delete a column from the condition, click the Delete button.
   - To edit a condition or a conditional format, click the corresponding icon.
8. You can specify another condition to include, or click OK if you are done.

The following example describes how conditional formatting can be applied to results.

Suppose a report includes ten ranking categories, with a value of 1 in the column indicating the worst ranking, and a value of 10 indicating the best ranking. You could apply conditional formatting to show the following:

- One image to indicate a low rank for columns that contain 1, 2, or 3.
- Another image to indicate an average rank for columns that contain 4, 5, 6, or 7.
- A third image to indicate a high rank for columns that contain 8, 9, or 10.

  To display only the images and not the ranking numbers, pull down the Position drop-down menu and choose Images Only.

Formatting Column Content

Use the Edit Format dialog box (and the options on the Style tab of the Column Properties dialog box) to select font, cell, border, and advanced style formatting options for column data that is shown inside a cell in a tabular format, such as a table or pivot table. You can also select settings for table and column headings.

If you are overriding the default formatting properties for a column, your selections are static. If you are specifying conditional formatting properties for a column, your selections apply only if the condition is met.

To use the Edit Format dialog box or the Style tab of the Column Properties dialog box

1. In the Criteria tab, pull down the menu for the desired column and choose Column Properties.
2. In the Column Properties dialog box, click the Style tab.
3. In the Font area, make your selections for font family, size, color, style (such as bold), and any effects to apply (such as underlining).
4. In the Cell area, make your selections for alignment, background color, and an image to display inside the cell.
   - The selections for horizontal and vertical alignment are similar to text justification selections in word processors. Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

     For horizontal alignment:

     Select left to left-justify the data. This is the most common justification for text data. Select Right to right-justify the data. This is the most common justification for numeric data. Select Center to center the data. To retain the default data alignment associated with this column, select Default.

For vertical alignment:

Select Top to align the data to the top of the table cell. Select Bottom to align the data to the bottom of the table cell. Select Center to align the data to the middle of the table cell. To retain the default vertical alignment associated with this column, select Default.

- When you click the Image button, the Select Image dialog box opens.
  - Select the No Image option if you do not want to include an image.
  - To include a custom image, select the Custom Image option and specify the appropriate path in the text box. The image should be one that is accessible to all users who will view the results. Custom images can be used for both conditional and unconditional results.
  - To include an image use the graphics selection window. The window shows images that are useful in conditional formatting, such as meters and trend arrows. The left pane shows the categories of images. When you click on an image category, the right pane shows the images in that category. Make your selection by selecting the radio button next to the image you want to use.
  - To specify the location of the image within the cell, make a selection from the Position drop-down menu:

  Default. Displays any images in the default position, which is usually to the left of the column data or heading.

  Left. Displays any images to the left of the column data or heading.

  Right. Displays any images to the right of the column data or heading.

  Images Only. Displays only the image, and not the column data or heading.

5. In the Border area, make your selections for the border position, color, and style of the cell.
6. In the Additional Formatting Options area, make your selections for column width, height, indent (left padding), right padding, top padding, and bottom padding.
7. In the Custom CSS Style Options (HTML Only) area, you can override style and class elements specified in style sheets. This capability is for users who know how to work with cascading style sheets.
   - Expand the Custom CSS Style Options (HTML Only) area by clicking the + icon.
   - Click the check box beside the settings you want to use, and then provide the location of the class, style, or style sheet.

     For example, for Use Custom CSS Style you can enter valid CSS style attributes, separated by semicolons, such as:

     ```
     text-align:center;color:red
     ```
8. Click OK when you are done to close the dialog box.

Using Custom Date/Time Format Strings

Custom date/time format strings provide additional options for formatting columns that contain timestamps, dates, and times.

To enter a custom date/time format string

1. In the Criteria tab, pull down the menu for the desired column (one that contains a timestamp, a date, or a time) and choose Column Properties.
2. In the Column Properties dialog box, click the Data Format tab.
3. Select the Override Default Data Format check box.
4. In the Date Format field, select Custom from the drop-down list.
5. In the Custom Date Format field, type the custom format string exactly as shown in the following tables, including left and right bracket characters ([ ]).

NOTE: You must type the custom format string into the Custom Date Format field. Custom format strings are not available for selection from the drop-down list.

General Custom Format Strings

The following table describes some general custom format strings and the results they display. These allow the display of date/time fields in the user's locale.

General Format String	Result
[FMT:dateShort]	Formats the date in the locale's short date format. You can also type [FMT:date].
[FMT:dateLong]	Formats the date in the locale's long date format.
[FMT:dateInput]	Formats the date in a format acceptable for input back into the system.
[FMT:time]	Formats the time in the locale's time format.
[FMT:timeHourMin]	Formats the time in the locale's time format but omits the seconds.
[FMT:timeInput]	Formats the time in a format acceptable for input back into the system.
[FMT:timeInputHourMin]	Formats the time in a format acceptable for input back into the system, but omits the seconds.
[FMT:timeStampShort]	Equivalent to typing [FMT:dateShort] [FMT:time]. This formats the date in the locale's short date format and the time in the locale's time format. You can also type [FMT:timeStamp].
[FMT:timeStampLong]	Equivalent to typing [FMT:dateLong] [FMT:time]. This formats the date in the locale's long date format and the time in the locale's time format.
[FMT:timeStampInput]	Equivalent to [FMT:dateInput] [FMT:timeInput]. This formats the date and the time in a format acceptable for input back into the system.
[FMT:timeHour]	Formats the hour field only in the locale's format, such as 8 PM.

ODBC Custom Format Strings

The following table shows the ODBC standard typed custom format strings and the results they display. These display date/time fields according to the ODBC standard.

ODBC Format String	Result
[FMT:dateODBC]	Formats the date in standard ODBC yyyy-mm-dd format (4-digit year, 2-digit month, 2-digit day).
[FMT:timeODBC]	Formats the time in standard ODBC hh:mm:ss format (2-digit hour, 2-digit minute, 2-digit second).
[FMT:timeStampODBC]	Equivalent to typing [FMT:dateODBC] [FMT:timeStampODBC]. This formats the date in yyyy-mm-dd format, and the time in hh:mm:ss format.

ODBC Format String	Result
[FMT:dateTyped]	Displays the word date and then shows the date, in standard ODBC yyyy-mm-dd format. The date is shown within single quote characters (‘).
[FMT:timeTyped]	Displays the word time and then shows the time, in standard ODBC hh:mm:ss format. The time is shown within single quote characters (‘).
[FMT:timeStampTyped]	Displays the word timestamp and then the timestamp, in standard ODBC yyyy-mm-dd hh:mm:ss format. The timestamp is shown within single quote characters (‘).

Custom Format Strings for Integral Fields

The following table shows the custom format strings that are available when working with integral fields. These allow the display of month and day names in the user's locale.

Integral fields hold integers that represent the month of the year or the day of the week. For months, 1 represents January, 2 represents February, and so on, with 12 representing December. For days of the week, 1 represents Sunday, 2 represents Monday, and so on, with 7 representing Saturday.

Integral Field Format String	Result
[MMM]	Displays the abbreviated month name in the user's locale.
[MMMM]	Displays the full month name in the user's locale.
[DDD]	Displays the abbreviated day of the week in the user's locale.
[DDDD]	Displays the full day of the week in the user's locale.

Custom Format Strings for Conversion into Hours

The following table shows the custom format strings that can be used to format data into hours. These can be used on the following kinds of fields:

- Fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).
- Fields where the output is in [FMT:timeHour] format. (This format displays the hour field only in the locale's format, such as 8 PM.)

Data Conversion Format String	Result
[FMT:timeHour]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and formats the number of hours into an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 2 AM, and a value of 12.24 as 12 PM.
[FMT:timeHour(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and formats the number of minutes into an hh display, where hh is the number of hours. Fractions are dropped from the value. For example, a value of 2 is formatted as 12 AM, and a value of 363.10 as 06 AM.

Data Conversion Format String	Result
[FMT:timeHour(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and formats the number of seconds into an hh display, where hh is the number of hours. Fractional hours are dropped from the value. For example, a value of 600 is formatted as 12 AM, a value of 3600 as 1 AM, and a value of 61214.30 as 5 PM.

Custom Format Strings for Conversion into Hours and Minutes

The following table shows the custom format strings that can be used to format data into hours and minutes. These can be used on fields that contain integers or real numbers that represent the time that has elapsed since the beginning of the day (12:00 AM).

They can also be used where the output is in [FMT:timeHourMin] format. (This format displays the time in the locale's time format, but omits the seconds.)

Data Conversion Format String	Result
[FMT:timeHourMin]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value into an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 12 is formatted as 12:12 AM, a value of 73 as 1:13 AM, and a value of 750 as 12:30 PM.
[FMT:timeHourMin(sec)]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value into an hh:mm display, where hh is the number of hours and mm is the number of minutes. Fractions are dropped from the value. For example, a value of 60 is formatted as 12:01 AM, a value of 120 as 12:02 AM, and a value of 43200 as 12:00 PM.
[FMT:timeHourMin(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the number of hours into an hh:mm display, where hh is the number of hours and mm is the remaining number of minutes. For example, a value of 0 is formatted as 12:00 AM, a value of 1.5 as 1:30 AM, and a value of 13.75 as 1:45 PM.

Custom Format Strings for Conversion into Hours, Minutes, and Seconds

The following table shows the custom format strings that can be used to format data into hours, minutes, and seconds. These can be used on fields that contain integers or real numbers that represent time.

They can also be used where the output is in [FMT:time] format, described in the topic General Custom Format Strings. (This format displays the time in the locale's time format.)

Data Conversion Format String	Result
[FMT:time]	This assumes that the value represents the number of seconds that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 60 is formatted as 12:01:00 AM, a value of 126 as 12:02:06 AM, and a value of 43200 as 12:00:00 PM.

Data Conversion Format String	Result
[FMT:time(min)]	This assumes that the value represents the number of minutes that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 60 is formatted as 1:00:00 AM, a value of 126 as 2:06:00 AM, and a value of 1400 as 11:20:00 PM.
[FMT:time(hour)]	This assumes that the value represents the number of hours that have elapsed since the beginning of the day, and converts the value into an hh:mm:ss display, where hh is the number of hours, mm is the number of minutes, and ss is the number of seconds. For example, a value of 6.5 is formatted as 6:30:00 AM, and a value of 12 as 12:00:00 PM.

Advanced Custom Formats

In addition to the formats previously described, you can format dates and times by creating your own format using some of the common date and time formats described in the following table.

For example, using the following formats, you can create the format:

dddd - h:mm tt

which formats the datestamp fields in the following way:

Monday - 4:03 PM

NOTE: When using these formats, do not include the square brackets ([ ]) that are required with other formats.

While the following formats do provide greater formatting flexibility, they do not allow date formats to change according to the user's locale setting, which is possible with many of the previous formats.

Some common date and time formats are described in the following table.

Format	Result
d	Number of the day of the month (for example: 1 through 31). Single-digit numbers do not have a leading zero (0).
dd	Like d, but single-digit numbers begin with a 0.
ddd	Three-letter abbreviation for the day of the week (for example: Sun, Mon).
dddd	Full name of the day of the week (for example: Sunday, Monday).
M	Month number (for example, 1, 12). Single-digit numbers do not have a leading 0.
MM	Similar to M, but single-digit numbers begin with a 0.
MMM	Three-letter abbreviation for the month (for example: Jan, Feb).
MMMM	Full name for the month (for example: January, February).
yy	Two-digit number for the year (for example: 06).

Format	Result
yyyy	Four-digit number for the year (for example: 2006)
h	Hour in a 12-hour format. Single-digit numbers do not have a leading 0.
hh	Similar to h, but single-digit numbers begin with a 0.
H	Hour in 24-hour format. Single-digits do not have a leading 0.
HH	Similar to H, but single-digit numbers begin with a 0.
m	Number of minutes. Single-digit numbers do not have a leading 0.
mm	Similar to m, but single-digit numbers begin with a 0.
s	Number of seconds. Single-digit numbers do not have a leading 0.
ss	Similar to s, but single-digit numbers begin with a 0.
tt	AM and PM indicator. Use with h and hh formats.

Setting Up Column Formulas

Advanced users can create new formulas, or edit existing formulas, using built-in functions. Oracle CRM On Demand supports a wide variety of SQL-92 functions, as well as extensions to SQL-92. For information about the available functions, see Using Functions in Analytics (on page 1047).

To edit or add a formula

1 In the Criteria tab, pull down the menu for the desired field and choose Edit formula.
2 In the Edit Column Formula dialog box, select the Column Formula tab.
3 Select the Custom Headings check box if you want to change the table heading and column heading text.
4 Modify the formula, as required, using the buttons below the Column Formula check box.
5 Select an aggregation rule from the Aggregation Rule drop-down list, as required.
6 Select the Bins tab and combine multiple values or ranges into bins, if required.
  For more information, see the To combine multiple values or ranges into bins procedure in this topic.
7 Click OK.
  In an analysis, you can also use functions and conditional expressions to present results in a variety of ways.

To combine multiple values or ranges into bins

1 In the Edit Column Formula dialog box, select the Bins tab.
2 Click Add Bin, enter or select the values or ranges of the value that you want to combine into the bin, then click OK.
3 In the Edit Bin Name dialog box, enter the name for the bin.
4 Repeat steps 2 and 3 until you have added all the bins that you want.

All instances of the different values that make up the bin in the result set will be replaced by the bin name. Aggregations are performed accordingly as well.

Adding Action Links to Analyses

You can add action links to an analysis. You can use action links to access record detail pages by clicking links on records in analyses available in the Analytics tab. You add action links using the following methods:

- **Using Action Links that invoke a Browser Script**. Using this method, you can configure the record type name in the report as an action link. The Action Link script takes the Row ID value in the report, and uses it to retrieve the specific record from Oracle CRM On Demand. You can use this method for the following record types only: Account, Activity (Appointment and Task), Campaign, Contact, Custom Object 01 through Custom Object 40, Lead, Opportunity, Opportunity Product Revenue, Partner, Service Request, Solutions, and User.
- **Using URLs**. Using this method, you can create links to any record type from a table or pivot table view. You can configure the record type ID column as an action link.

  NOTE: If users click an action link on a page that has a dynamic layout, then the links are displayed with the standard layout for that page.

About Record Type Names in Action Links

When you add an action link, you must use the original record type name in the code or URL that adds the link. If your company administrator has changed the names of record types in Oracle CRM On Demand, you must determine the original name of the record type where you want to add the link.

For example, your company administrator might have renamed the Account record type so that is now called the Customer record type. If you want to add an action link to a result for the Customer record type, the action link that invokes a Browser Script or URL must refer to the Account record type (that is, the original name of the record type). The values for the Record Type and Row Id parameters for the action link for the renamed Customer record type are shown in the following table.

Name	Prompt	Value
Record Type	Record Type	Account
Row Id	Row Id	"Account.Account ID"

The record type name must be spelled correctly. However, the field is case insensitive.

TIP: For most record types, you can determine the original name of the record type for which you want to add a link, by opening the Homepage for the record type. The URL in the Address field in your browser window shows the original name of the record type. In the example where the Account record type was renamed to Customer, the Customer Homepage shows the following URL:
https://*server_name*/OnDemand/user/AccountHomePage
where:
server_name is the URL used for signing in to Oracle CRM On Demand.

However, for a Custom Object record type, do not enter the record type name as it appears in the URL for the Custom Object Homepage. Instead, enter the record type name in the format Custom Object 01, Custom Object 02, Custom Object 03, and so on. For the Service Request record type, enter Service. For the Opportunity Product Revenue record type, enter Revenue.

When adding an action link for the renamed Customer record type (originally the Account record type) using a URL, use the Account record type name in the URL, as shown in the following example:

```
"@[html]"<a target=_top href=/OnDemand/user/AccountDetail?
OMTGT=AccountDetailForm&OMTHD=AccountDetailNav&AccountDetailForm.Id="@">"@"</a>
```

NOTE: The examples of code for action links in this topic might appear across more than one line due to length. The code for an action link must be entered as one line. If you copy and paste a code example from this topic, then the code might contain line breaks. You must delete any line breaks that occur in the code.

TIP: To determine the correct URL for the Detail page for a record type, open the Detail page for any record of that record type. In the Address field in your browser window title bar, copy the relevant part of the address string, from /OnDemand to Id=. In the example where the Account record type was renamed to Customer, the URL is copied from the Detail page of a Customer record.

In some cases, the full record type name is used in all places in the URL for a record type detail page, as is the case with the URL shown in the preceding example. However, in other cases, an abbreviated version of the record type name is used in certain locations in the URL.

For example, if the record type for which you are adding the link was originally the Opportunity record type, the code for the link is as follows:

```
"@[html]"<a target=_top href=/OnDemand/user/OpportunityDetail?
OMTGT=OpptyDetailForm&OMTHD=OpportunityDetailNav&OpptyDetailForm.Id="@">"@"</a>
```

It is recommended that you use a relative URL rather than an absolute URL in the code for a link.

To add action links using an Action Link that invokes a Browser Script

1. In Oracle CRM On Demand Analytics, in the Criteria tab, add the columns to the report.
2. You must add the record type ID field (for example, Account ID) to the report. It is mandatory to have the record type ID field as that will be used to determine which record to navigate to. This column can be hidden if needed but not mandatory as described below:
   a. Click the Column Properties button for the record type ID column.
   b. In the Column Properties dialog box, click the Column Format tab.
   c. In the Column Format tab, select the Hide this column check box, and click OK.
3. In the Criteria tab, click the Column Properties button for the record type column on which action link is being created.
4. In the Column Properties dialog box, click the Interaction tab.
5. In the Interaction tab, select Action Links from the drop-down menu for Primary Interaction under Value.
6. Click the Add Action Link icon.
7. In the New Action Link popup that appears, click the Create New Action icon and select Invoke a Browser Script from the drop-down that appears.
8. In the Create New Action popup window, click Browse and select USERSCRIPT.ActionLink as the Function Name, and then click OK.
9. In the Parameters section:
   a. For Record Type, in the value column, enter the name of the record type for which the Analysis is being created (for example Account). Select the Fixed and Hidden check boxes as this value will be the same throughout the analysis and doesn't need to be entered again. The record type name must be one of the following: Account, Appointment, Campaign, Contact, Custom Object 01, Custom Object 02, Custom Object 03, and so on, up to and including Custom Object 40, Lead, Opportunity, Partner, Revenue, Service, Solutions, Task, User.
   b. For the Row Id, select Column Value from the drop-down menu and select the corresponding Object ID column that you had added in the earlier step while defining the criteria. Select the Fixed and Hidden check boxes for this row too as this value remains unchanged throughout the report and doesn't need to be entered again. (For example select "Account.Account ID" from the drop-down for Column values.)
   c. Click OK, and then click OK again.

10 In the Column Properties window, select the check box for Do not display in a popup if only one action link is available at runtime.

11 Click OK.

12 To display the report, click the Results Tab.

The following procedure describes how to add action links using URLs. You can use this procedure to add action links for any record type.

Before you begin. To perform this procedure, your user role must include the Analytics Scripting privilege.

To add action links using URLs

1 In Oracle CRM On Demand Analytics, in the Criteria tab, add the columns to the report, including the record type ID (for example, Account ID) column.

NOTE: For the action link to work, you must add the record type ID field to the report.

2 Click the Column Properties button for the record type ID column.

3 In the Column Properties dialog box, click the Data Format tab.

4 In the Data Format tab, do the following:

5 Select the Override Default Data Format check box.

6 In the Treat Text As list, select Custom Text Format.

7 In the Custom Text Format field, enter the code for the link after the at sign (@), as shown in the following example:

```
"@[html]"<a target=_top href=/OnDemand/user/OpportunityDetail?
OMTHD=OpportunityDetailNav&OMTGT=OpptyDetailForm&OpptyDetailForm.Id="@">"@"</a>
```

In the preceding example, the URL is for the Opportunity record type. Use the appropriate URL for the record type for which you are creating the link.

NOTE: Remember that you must use the original record type name in the URL.

Oracle CRM On Demand Analytics replaces the final at sign (@) in the string with the value of the record type ID for each record in the report. If you do not want the link to display the record type ID, replace the final at sign (@) with the text that you want to be displayed. In the following example, the ID in the action link will be replaced with the word View:

```
"@[html]"<a target=_top href=/OnDemand/user/OpportunityDetail?
OMTHD=OpportunityDetailNav&OMTGT=OpptyDetailForm&OpptyDetailForm.Id="@">View</a>
```

8 Click OK.

9 To preview the Analysis, click Show how results will look on a Dashboard.

The following example shows the code to use for a link on an asset record:

```
"@[html]"<a target=_top href=/OnDemand/user/AssetDetail?
OMTHD=AssetDetailNav&OMTGT=AssetDetailForm&AssetDetailForm.Id="@">"@"</a>
```

The following example shows the code to use for a link on an appointment record:

```
"@[html]"<a target=_top href=/OnDemand/user/ApptDetail?
OMTHD=ApptRead&OMTGT=ApptDetailForm&ApptDetailForm.Id="@">"@"</a>
```

The following example shows the code to use for a link on a task record:

```
"@[html]"<a target=_top href=/OnDemand/user/TaskDetail?
OMTHD=ReadTaskDetail&OMTGT=TaskDetailForm&TaskDetailForm.Id="@">"@"</a>
```

Sorting and Reordering Columns

You can specify multiple levels of sort order for the columns in an analysis. For example, you can specify that the records will be sorted first by Column A, then by Column B, and so on. If one or more sort levels are applied, then the sort levels are indicated by numbers, and the sort direction (ascending or descending) for a column is indicated by an arrow.

To sort an analysis based on columns

1. In the Criteria tab of the analysis editor, in the Selected Columns pane, click the drop-down list of options for the desired column and choose Sort.
2. From the Sort submenu, choose one of the following:
   - **Sort Ascending.** Sorts this column as the first-level sort, with the lowest values at the top, and the highest values at the bottom. If a sort setting was previously applied to another column, then the sort setting is cleared from that column.
   - **Sort Descending.** Sorts this column as the first-level sort, with the highest values at the top, and the lowest values at the bottom. If a sort setting was previously applied to another column, then the sort setting is cleared from that column.
   - **Add Ascending Sort.** Sorts this column in ascending order as an additional sort level to any sort setting already applied to other columns. Any sort settings applied to other columns are not cleared.
   - **Add Descending Sort.** Sorts this column in descending order as an additional sort level to any sort settings already applied to other columns. Any sort settings applied to other columns are not cleared.
   - **Clear Sort.** Removes any sort setting that was applied to this column in the Selected Columns pane of the Criteria tab. If a sort setting was previously applied to this column in a view in the Results tab, then that sort setting is not cleared.
   - **Clear All Sorts in All Columns**. Removes any sort settings that were applied to any of the columns in the Selected Columns pane of the Criteria tab. Any sort setting that was previously applied to a column in a view in the Results tab is not cleared.

   When you click the Results tab, the column is sorted based on your selection.

To reorder columns

- In the Criteria tab, drag columns from their current location to a new location.

NOTE: When you create a new analysis, the order of the columns in the Criteria tab determines the order of the columns in the Table view that is displayed by default when you first open the Results tab. However, after you open the Results tab in the analysis editor, reordering the columns in the Criteria tab does not change the order of the columns in any view in the Results tab; if you want to reorder the columns in a view, then you must edit the view in the Results tab.

Combining Multiple Subject Areas in a Single Analysis

The simplest and fastest way to create and generate an analysis is to use a single subject area. If the dimension columns and metrics that you are interested in are all available from a single subject area, then you should use that subject area to build the analysis.

If your analysis requirements cannot be met by any single subject area, then you can create an analysis that combines information from two or more subject areas. You can create a combined analysis using the Set operations, which were supported in releases earlier than Release 40 and continue to be supported. For more information about using the Set Operations, see Combining Analyses Using Set Operations (on page 999). Starting with Release 40, you can also create a combined analysis using common dimensions. A *common dimension* is a dimension that is available in all of the subject areas that are to be combined. A *local dimension* is a dimension that is available in one or more of the subject areas, but is not available in all of them. You can include columns from local dimensions as well as columns from common dimensions in a combined analysis.

If you want to use metrics from multiple subject areas, then there is an advantage to using columns from common dimensions only, if your requirements can be met in this way. When an analysis that combines multiple subject areas is generated, separate queries are executed for each subject area in the analysis and the results are merged to generate the final analysis. The data that is returned from the different subject areas is merged using the common dimensions. If you use columns from common dimensions only, then the result set returned by each subject area query is at the same granular level, and it can be cleanly merged and rendered in the analysis.

When you include columns from local dimensions in your analysis, some of the results might be at different granular levels.

When combining two or more subject areas in a single analysis, note the following points:

- The subject area that you select when you first create an analysis is referred to as the primary subject area. Any subject areas that you later add to the analysis are referred to as the related subject areas.
- You can combine a real-time subject area with other real-time subject areas, and you can combine an historical subject area with other historical subject areas. You cannot combine a real-time subject area with an historical subject area.
- You must include a metric from the primary subject area and a metric from each of the related subject areas in the combined analysis. You do not have to display the metrics or use them, but you must include them. You can hide a metric if you do not need it in the analysis.
- To make sure that the results for all of the subject areas are at the same granular level, include at least one column from at least one common dimension in your combined analysis.
- When you select columns from a common dimension, select only columns that are available in the same dimension in all of the subject areas.

  In some cases, a dimension that is common to two or more subject areas might not contain the same set of columns in each of the subject areas. In such cases, it is recommended that you select only columns that are available in the common dimension in all of the subject areas.
- When selecting columns from a common dimension, select all of the columns from a single subject area.
- If you select columns from one or more local dimensions as well as columns from one or more common dimensions, then you must enable the dimensionality variable for the query, so that the query will return the total value for the selected measures. If you select columns from common dimensions only, then you do not need to enable the dimensionality variable. The procedure later in this topic includes information on how to enable the dimensionality variable for a query.

For an example of combining multiple subject areas in a single analysis, see Example of Combining Multiple Subject Areas in a Single Analysis (on page 998).

The following procedure describes how to combine multiple subject areas in a single analysis.

Before you begin. To perform this procedure, your user role must have the Cross-Subject Areas Analytics privilege.

To combine multiple subject areas in a single analysis

1. In the Criteria tab or the Results tab of the analysis editor, in the Subject Areas pane, click the Add/Remove Subject Areas icon.
2. Select the check box for each of the related subject areas that you want to add to the analysis.

   You can now select the columns and metrics that you want from the primary subject area and the related subject areas. Remember that you must include a metric from each of the subject areas.
3. If you selected columns from both local dimensions as well as columns from common dimensions, then when you finish adding the columns and metrics to the analysis, do the following:
   a. Click the Advanced tab.

The Advanced tab shows the SQL code that will be submitted to the Oracle BI server when the analysis is executed.

b In the Advanced tab, select the Dimensionality check box and then click Apply SQL.

The SQL code is automatically updated to enable the dimensionality variable, so that the query will return the total value for the selected measures in the dimensions.

NOTE: If you do not enable the dimensionality value and apply the SQL when using local dimensions, or if you do not add metrics from all the subject areas involved in the analysis, then you might experience ODBC errors or get incorrect results. You might also get incorrect results when you combine subject areas for which there are no relationships defined at the subject area level. In such cases, create a combined analysis using SET operators instead to get the results that you need.

If you want to remove a related subject area from an analysis, perform the steps in the following procedure.

To remove a related subject area from an analysis

1 In the Criteria tab or the Results tab of the analysis editor, delete from the analysis all of the columns and metrics that you selected from the related subject area.

NOTE: If any of the columns or metrics that you selected from the related subject area remain in the analysis, then you will not be able to remove the related subject area from the analysis.

2 In the Subject Areas pane, click the Add/Remove Subject Areas icon, and deselect the check box for the related subject area.

Example of Combining Multiple Subject Areas in a Single Analysis

This topic provides one example of how you might combine multiple subject areas. In this example, the Opportunities and Partners subject area is combined with the Opportunity Product Revenues subject area so that you can display the opportunity with opportunity partner records, and for each opportunity partner record, display the opportunity product revenue records associated with the opportunity as well.

NOTE: To combine multiple subject areas in a single analysis, your user role must have the Cross-Subject Areas Analytics privilege.

1 Create a new analysis using the Opportunities and Partners subject area.

The Opportunities and Partners subject area becomes the primary subject area for the analysis.

2 Click the Add/Remove Subject Areas icon and add the related subject area Opportunity Product Revenues.

3 Add columns from one or more of the following common dimensions: Account, Account Territory, Campaign, Opportunity, Owned By User, Primary Contact.

For example, from the Opportunities and Partners subject area, add the Account ID, Account Name, Opportunity ID and Opportunity Name columns. Note that you select all of the columns from the common dimensions from only one subject area. In this example, they are selected from the Opportunities and Partners primary subject area.

4 Add columns from one or more the following local dimensions:

- From the Opportunities and Partners subject area, add columns from the Opportunity Partner, Relationship Contact, and Territory dimensions.
- From the Opportunity Product Revenues subject area, add columns from the Opportunity Product Revenue, Product, Product Category, and Quota dimensions.

For example:

  - From the Opportunities and Partners primary subject area, add the following columns from the Opportunity Partner dimension: Account Name, Account Type, and Region.

- From the Opportunity Product Revenues related subject area, add the Start/Close Date and Probability % columns from the Opportunity Product Revenue dimension, and add the Product Name from the Product dimension.

5 Add metrics from both the primary subject area and the related subject area.

For example:

- From the Opportunity Metrics folder in the Opportunities and Partners primary subject area, add Number (#) of Opportunities.
- From the Opportunity Product Revenues Metrics folder in the Opportunity Product Revenues related subject area, add Number (#) of Products.

NOTE: If you click the Results tab at this point, you will see that the analysis as it is currently set up returns an ODBC error instead of actual results. This is because the analysis uses local dimensions in addition to common dimensions. When the analysis uses local dimensions, you must enable the dimensionality variable and apply the SQL.

6 Click the Advanced tab, select the Dimensionality check box and then click Apply SQL.

7 Click the Results tab.

The analysis now returns the results that join the records from the Opportunities and Partners subject area with the opportunity product revenues records.

Related Topics

- Combining Multiple Subject Areas in a Single Analysis (on page 996)

Combining Analyses Using Set Operations

A combined analysis is an analysis that combines the results of multiple criteria into a single analysis by querying two or more subject areas to generate a new result. By using this technique, you can combine these criteria allowing you to simulate joins that otherwise do not exist. Each column from a combined analysis contains the results of multiple queries against the subject areas. Each criterion in a combined analysis can be created using the same or different subject areas. By using set operators, you can define how the data sets generated by each criterion are related to one another.

NOTE: The number of columns from each subject area must be the same, and the data types of the columns that you want to combine must be the same. The column lengths can differ.

The following table lists the Set operators and describes their effects on results.

Set Operator	Effect on Results
Union	Returns nonduplicate rows from all columns.
Union All	Returns all rows from all columns, including duplicate rows.
Intersect	Returns rows that are common to all columns.
Minus	Returns rows from the first column that are not in the other columns.

To combine analyses

1 In the Criteria tab of the analysis editor, add the columns that you want to include in the analysis.

2. In the Selected Columns pane, click the "Combine results based on union, intersection, and difference operations" icon.
3. In the Subject Area dialog box, select a subject area that contains the data that you want to combine with the columns in your analysis.

   The subject area can be the same as the subject area from which the existing columns in the report are taken or a different subject area.

   The Set Operations page appears.
4. From the Subject Areas pane, add the columns that you want to combine with the columns you have already selected for the analysis.
5. Click the Union icon and select the operation type.
6. (Optional) To change the heading or edit other properties of the combined column, do the following:
   a. Click the Result Columns link.
   b. In the drop-down list of options for the column, select Column Properties.
7. Click the Results tab to view the columns in a table in the compound layout for the analysis.

More information about combining analyses is available on My Oracle Support, as follows:

- For general information about combining analyses, see Doc ID 2319063.1.
- For information about when you might want to create a combined analysis, see Doc ID 2319069.1.
- For information about how to create a combined analysis, see Doc ID 2319046.1.
- For information about how to create a combined analysis with null (negative) reporting, see Doc ID 2319040.1.
- For information about how to write result column formulas in a combined analysis, see Doc ID 2319061.1.
- For information about Layout changes to consider in a combined analysis, see Doc ID 2319065.1.

Step 2: Reviewing Results and Creating Layouts

After you define the criteria for your analysis, you can edit the compound layout for the analysis in the Results tab of the analysis editor. When you first open the Results tab after selecting the criteria for a new analysis, the results are shown in a Table view. The Table view inherits the formats, sorting, and other options that you specified in the Criteria tab.

A Title view is also included. If you already saved the analysis, then the Title view shows the name of the analysis. Otherwise, the Title view is blank. You can edit the Title view and the Table view, or you can delete them if you wish. You can also add more views to the compound layout.

NOTE: If the criteria and filters that you set up for an analysis result in no data being returned, then no views are displayed when you first open the Results tab. Instead, a message is displayed. You can create a custom message that is displayed when no data is returned, for more information, see Creating Custom Messages for No Data in Analyses (on page 1041).

You can add multiple views to a compound layout. You can also create multiple compound layouts for a single analysis. For example, one compound layout might include a Graph view and a Title view, and another compound layout might include a Graph view and a Narrative view. When you add the analysis to a dashboard page, you can select the compound layout that you want to include on that page.

The following table describes the types of views that you can add to a compound layout for an analysis.

View	Description
Title	Use this view to include a title and subtitle, a saved name for the results, and a custom logo to identify the results, and timestamps. For result-specific help, you

View	Description
	can include a URL that links to any HTML page or site that contains information about the analysis or the results.
Table	Use this view to display data in a column format. You can select to display a page of information at a time, which is convenient for larger result sets, and control the size of the page and the position of the paging controls. Table views are supported in a wide variety of formats and can include graphics, links, and so on.
Pivot Table	Use this view if you want to be able to take row, column and section headings and swap them around to obtain different perspectives. You can drag and drop headings to pivot results, preview them, and apply the settings. Users can navigate through pivot tables and drill down into information. Users can create complex pivot tables that show aggregate and nonrelated totals next to the pivoted data, allowing for flexible analysis. For an interactive result set, elements can be placed in pages, allowing users to select elements. Like the Table view, elements can be formatted.
Performance Tile	Use this view to display a single aggregate measure value that immediately reveals summary metrics that you might also present in more detail within a dashboard view. Performance Tile views can help to do the following: ▪ Focus the user's attention on simple, need-to-know facts directly and prominently on the tile. ▪ Communicate status through simple formatting by using color, labels, and limited styles, or through conditional formatting of the background color or measure value to make the tile visually prominent. For example, if revenue is not tracking to target, then the revenue value may appear in red. ▪ Respond to prompts and filters to make the results more relevant to the user. ▪ Support a single, aggregate or calculated value.
Treemap	Use this view to display a space-constrained, two-dimensional visualization for hierarchical structures with multiple levels. Treemap views have the following characteristics: ▪ They are limited by a predefined area and display two levels of data. ▪ They can contain rectangular tiles. The size of the tile is based on a measure, and the color of the tile is based on a second measure. ▪ They are similar to a scatter plot graphs in that the map area is constrained, and the graph allows you to visualize large quantities of data and quickly identify trends and anomalies within that data.
Trellis	Use this view to display multidimensional data as a set of cells in a grid, with each cell displaying a subset of data shown as graphs or numbers. The following types of Trellis views are available:

View	Description
	■ **Simple Trellis.** Simple Trellis views are appropriate if you want to compare like to like in a set of data. A Simple Trellis view displays a single inner graph type, for example a grid of multiple Bar graphs. The inner graphs always use a common axis; that is, the graphs have a synchronized scale. ■ **Advanced Trellis.** Advanced Trellis views are appropriate if you want to monitor trends and see patterns in a set of data. An Advanced Trellis view displays a grid of small spark graphs. Measures can be shown as numbers or represented in various types of spark graphs. In an Advanced Trellis view, each measure column operates independently for drilling, axis scaling, and so on.
Graph	Use this view to display numeric information visually, which makes it easier to understand large quantities of data. You can control the title, the location of the legend, axis titles, and data labels in the Graph view. You can also control the size and scale of the graph, and control colors using a style sheet. In addition, you can drill down into the results. A graph is displayed on a background, called the graph canvas.
Gauge	Use this view to show results as gauges, such as dial, bar, and bulb-style gauges. Due to its compact size, a gauge is often more effective than a graph for displaying a single data value. As well as displaying the data visually, a gauge also displays the result in numeric form. Gauges identify problems in data. A gauge usually plots one data point with an indication of whether that point falls in an acceptable or unacceptable range. Thus, gauges are useful for showing performance against goals. Depending on the data in the analysis, a Gauge view might consist of multiple gauges in a gauge set. For example, if you create a Gauge view to show the sales data for the last twelve months, the Gauge view consists of twelve gauges, one for each month. If you create a Gauge view to show the total sales in the country, then the Gauge view consists of one gauge. A gauge or gauge set is displayed on a background, called the gauge canvas.
Funnel	Use this view to display a three-dimensional graph that represents target and actual values using volume, level and color. It is useful for depicting target values that decline over time, such as a sales pipeline.
Map	Use this view to display records that contain addresses as data points on a map. Information from the analysis appears as tooltip text when users rest their pointer on the data points.
Filters	Use this view to show the filters that are in effect for the analysis.
Selection Steps	Use this view to display the selection steps that are in effect for the analysis. Selection steps, like filters, allow you to obtain results that answer particular questions. Selection steps are applied after the query is aggregated.

View	Description
Column Selector	Use column selectors to allow users to dynamically change which columns are displayed in the analysis. This allows users to analyze data along several dimensions and dynamically alter the content of the results.
View Selector	Use this view to allow users to select a specific view of the results from among the saved views. When placed on a dashboard, the View Selector view appears as a drop-down list where users can make a selection.
Legend	Use this view to document the meaning of special formatting used in results, such as the meaning of custom colors applied to gauges.
Narrative	Use this view to display the results as one or more paragraphs of text. You can enter a sentence with placeholders for each column in the results, and specify how rows should be separated. You can incorporate custom HTML or JavaScript to specify how information is displayed.
Ticker	Use this view to display the results as a ticker or marquee, similar in style to the stock tickers that run across many financial sites on the Web. This view is useful for calling attention to results and for late-breaking information. You can control what information is presented and how it scrolls across the page. This view supports a variety of formats and can include graphics, links, and so on.
Static Text	Use this view to include static text in the results. You can use HTML to include banners, tickers, Active-X objects, Java applets, links, instructions, descriptions, graphics, and so on, in the results.

For More Information

Click a topic to see step-by-step instructions to do the following:

- Adding and Editing Views (on page 1004)
- Adding Titles to Results (on page 1008)
- Adding Tables to Results (on page 1008)
- Showing Results in Performance Tile Views (on page 1010)
- Showing Results in Treemap Views (on page 1010)
- Showing Results in Trellis Views (on page 1011)
- Showing Results in Graph Views (on page 1012)
- Showing Results in Pivot Table Views (on page 1017)
- Showing Results in Gauge Views (on page 1024)
- Showing Filters Applied to Analytics Results (on page 1025)
- Adding Markup Text to Results (on page 1026)
- Adding Legends to Reports Using Legend View (on page 1028)
- Allowing Users to Change Columns in Analyses (Column Selector View) (on page 1028)
- Allowing Users to Select a Specific View Using View Selector View (on page 1029)
- Showing Results in Funnel Views (on page 1029)
- Showing Results in Map Views (on page 1031)
- Adding Narrative Text to Results (on page 1033)
- Showing Results in Ticker Views (on page 1035)

See the following topics for related information:

Adding and Editing Views

You can add multiple views of results to a compound layout for an analysis, such as graphs and pivot tables that allow you and other users who run the analysis to look at the results in more meaningful ways, using the presentation capabilities of the various views. For information about the types of views that are available, see Step 2: Reviewing Results and Creating Layouts (on page 1000).

Each type of view has its own editor. Each view editor contains unique functionality for that view type but might also contain functionality that is the same across view types.

The following procedure describes how to add a view to a compound layout.

To add a view to a compound layout

1. If the analysis to which you want to add a view is not already open in the analysis editor, then do the following:
   a. Click the Analytics tab.
   b. On the Home page, click Catalog and locate the analysis.
   c. Click the Edit icon in the toolbar.
      The analysis editor opens.
2. In the analysis editor, click the Results tab.
3. Click the New View icon, and then select the view that you want to add.
   The new view appears at the bottom of the compound layout.

The following procedure describes how to edit a view.

To edit a view

1. In the analysis editor, click the Results tab.
2. Click the Edit View icon for the view you want to edit.
   The editor for the view opens.
3. In the view editor, make any changes that you want to make to the view, and then click Done to close the view editor.

   NOTE: When you click Done, your changes to the view are temporarily saved. The changes are not permanently saved until you save the analysis.

   TIP: During the time that the view editor is open, you can undo any changes that you made to the view but have not yet saved, by clicking Revert.
4. To move the view to a different location within the compound layout, drag the view, and drop it in the new location.
5. To format the appearance of the view, click the Format Container icon for the view.

You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).

6 To set the properties for a view, click the View Properties icon for the view.

7 To remove the view from the compound layout, click the red X icon for the view.

NOTE: Clicking the red X icon for a view removes the view from the compound layout but does not delete the view from the analysis. The view remains available in the Views pane in the lower-left corner of the analysis editor, so that you can easily add the view back into a compound layout for the analysis if you wish.

8 To delete the view permanently from the analysis, select the view in the Views pane and then click the red X icon.

About the Recommended Visualization and Best Visualizations Options

If you know what type of view you want to add to an analysis, then you can select that view type directly from the New View menu in the Results tab of the analysis editor. Alternatively, you can use the Recommended Visualization and Best Visualization options to help you to choose the best type of view for your analysis. In the context of Analytics in Oracle CRM On Demand, a *visualization* is a representation of data. In the Recommended Visualization submenu, you can select the option that best describes what you intend to illustrate with the view that you are creating. Each possible view type then receives a score based on a predefined set of rules and on the criteria that you selected for your analysis. A ranked list of recommended views is automatically generated, and you can choose from the list. View types that do not receive a score above a certain level are excluded from the list of recommended views.

If you do not wish to choose from a set of suggested views, then you can instead select the Best Visualization option to have the best type of view created for you immediately. The Best Visualization option automatically creates the most appropriate type of view based on the criteria that you selected for your analysis.

About Drop Targets in View Editors

The Layout pane in a view editor can contain one or more drop targets, depending on the view type. A *drop target* is an area where you place one or more columns to specify the position and purpose of the columns in the layout.

The drop targets are as follows:

- **View-type Prompts**. For example, Table Prompts for a Table view. The fields in this drop target provide an interactive result set that enables users who view the analysis to select the data that they want to view. The values from the columns that are displayed in this drop target are used as the initial criteria. In a view, these values are displayed in a drop-down list for selection.
- **Sections.** The fields in this drop target populate the areas that divide the view into sections. In Graph, Gauge, and Funnel views, you can choose to display the columns that you drop in the Sections drop target as a section slider rather than as individual sections, by selecting the Display as Slider check box.
- **View-type area.** For example, Table for a Table view. This drop target simulates the plot area or the body of the view itself and assists you in seeing what the view looks like. For a Table view, this area contains the Columns and Measures drop target, which contains all the columns in the view. In a Table view, all measures are treated as columns. For all other views, this area contains the following drop targets:
  - **Measures drop target.** The fields in this drop target populate the part of a view that contains summary data. Depending on the type of view, this area might include a single Measures drop target (for example, for Pivot Table views) or might contain sub-drop targets (for example, the Bars and the Lines sub-drop targets for line-bar graphs). You drag and drop measure columns to these drop targets.
  - **Excluded.** Fields in this drop target are columns that are excluded from the view results but remain as part of the analysis.
  - **Other drop targets.** Other drop targets are used to summarize the columns in the Measures drop target or targets. The other drop targets that are displayed in a view depend on the type of view as described in the following table.

<table>
<tr><th>View</th><th>Drop Targets</th></tr>
<tr><td>Pivot Table</td><td>Includes the following drop targets:
Columns. Shows a column in a column orientation. Pivot Table views can contain multiple columns.
Rows. Shows a column in a row orientation. Pivot Table views can contain multiple rows.</td></tr>
<tr><td>Gauge</td><td>Rows. Shows the columns that are displayed in the gauges.</td></tr>
<tr><td>Bar, line, area, line-bar, time series line, pareto, scatter, or bubble graph</td><td>Includes the following sub-drop targets within the main drop target. The target names differ depending on the graph type. For example, Group By is Bubbles for bubble graphs and Points for scatter graphs:
Group By. Clusters the axis labels into groups. For example in a vertical bar graph whose criteria includes the Region, District, and Dollars column, if this drop target contains the Region column, then the data is grouped by region on the horizontal axis.
Vary Color By. (Not enabled for pareto graphs.) Shows each column value or column value combination in a different color.</td></tr>
<tr><td>Radar graph</td><td>Radar Sections. Shows column values as points on each line along a radius of the circle.</td></tr>
<tr><td>Pie graph</td><td>Includes the following drop targets:
Pies. Shows each column value or column value combination as a separate pie.
Slices. Shows each column value or column value combination as a separate slice of the pie.</td></tr>
<tr><td>Waterfall graph</td><td>Group By. Clusters the axis labels into groups.</td></tr>
<tr><td>Funnel</td><td>Stage. Shows each column value as a stage in the funnel.</td></tr>
</table>

View	Drop Targets
Trellis	Includes the following drop targets: ■ Columns. Shows a column in a column orientation. Trellises can contain multiple columns. ■ Rows. Shows a column in a row orientation. Trellises can contain multiple rows. Includes the following sub-drop targets within the main Visualization drop target for Simple Trellis views: ■ Group By. Clusters the measures into groups. ■ Color By. Shows each measure in a different color, for example, in a vertical bar graph of a trellis, all the bars for one measure are blue while the bars showing another measure are red. In a scatter graph, use this drop target to vary the points by color. In a bubble graph, use this drop target to vary the bubbles by color. ■ Bar Axis. In a line-bar graph comparing two measures, for example revenue and billed quantity by region, shows one of two measures, such as Revenue. ■ Line Axis. In a line-bar graph comparing two measures, for example, revenue and billed quantity by region, shows one of two measures, such as Billed Quantity. ■ Pies. In a pie graph, adding a dimension here creates multiple pies. ■ Slices. In a pie graph, shows measures as slices of varying colors within pies. ■ Points. In a scatter graph, shows dimensions as points. Each dimension value is shown as one point. ■ Horizontal Axis. The measure values control the horizontal position of the values. In a scatter graph, you can drop one measure in this target. In a bubble graph, each measure in this drop target is shown as one bubble. ■ Vertical Axis. In a scatter graph, shows one of two measures, such as a point. In a bubble graph, shows one of three measures as a bubble. ■ Bubbles. In a bubble graph, shows measures as bubbles of varying size. ■ Size. In a bubble graph, shows one of three measures as the size of a bubble. Includes the following sub-drop targets within the main Visualization drop target for Advanced Trellis views: ■ Areas. In a spark area microchart, shows columns displayed as areas. ■ Bars. In a spark bar microchart, shows columns displayed as bars. ■ Lines. In a spark line microchart, shows columns displayed as lines.
Performance Tile	Measure. Shows the specific value of the column that displays on the tile.
Treemap	Includes these drop targets: ■ Group By. Represents the top level of hierarchical data that is sliced to produce or describe a container of aggregated values. The aggregated values display as rectangular tiles. ■ Size By. Represents the distribution of the tiles within their parent. The size of the children is always equal to the size of their parent. ■ Color By. Represents a distribution of values across all of the tiles at the same level.

In addition, each view-type area, except for the Table area, Waterfall Graph area, Pareto Graph area, Treemap area, and Trellis (Simple) area, contains the Measure Labels element. The Measure Labels element represents the labels for all the measures columns in the drop targets in the Measures area. You can modify how a measure label is shown in a view by dragging the Measures Labels element from one drop target and dropping it in another. For example, in a vertical bar graph, you can show each measure label in a different color by dragging and dropping the Measure Labels element to the Vary Color By drop target. In Pivot Table views, you can also edit the format of measure labels or hide them.

Adding Titles to Results

Use the Title view to add a title, a subtitle, a logo, a link to a custom online help page, and timestamps to the results. Titles and subtitles can be formatted.

A Title view is always added to the results, as the first view.

To work with a Title view

1. In the Results tab, perform one of the following actions:
   - To add a new title view, click the New View button, and then select Title from the drop-down list.
   - To edit an existing title view, find the title view, and click the Edit View button.
2. In the Title text box, enter the text to display as the title.

   If you do not specify a title, the name of the saved report is used as the title. For unsaved reports, the Title text box is blank.
3. If you do not want the saved name of the report to appear, deselect the Display Saved Name check box.

   If the check box is checked, the saved name is displayed below the text in the Title text box (if this text exists).
4. (Optional) If you want to display a logo image or other graphic, specify the appropriate path in the Logo text box.

   The image is displayed to the left of the title text. The image or graphic should be accessible to all users who view this report.
5. (Optional) In the Subtitle text box, enter the text to display as a subtitle.

   The subtitle text will follow the actual title, on a new line.
6. If you want to add additional formatting to the title or subtitle, do the following:
   a. Click the edit buttons to the right of the Title and Subtitle dialog boxes.
   b. Make your choices for font, cell, and border options, and then click OK.

   NOTE: If you enter a new caption, it replaces the original title or subtitle.
7. If you want to display the report execution date or time, select one of the timestamp options from the Started Time drop-down list.
8. If you want to provide a link to customized help or other information related to the report, enter the appropriate URL in the Help URL text box.

   The URL should be one that is accessible to all users who will view this report.
9. When you are done, you can save the report with the Title view.

Adding Tables to Results

Use the Table view to show results in a standard table. Users can navigate and drill down in the results. You can add a grand total and column totals, specify custom table and column headings, and change the formula or aggregation rule for a column. You can also edit properties for a column to control the appearance and layout of a column and its contents, and specify formatting to apply only if the contents of the column meet certain conditions.

You can also specify paging controls and the number of rows per page, specify whether column and table headings are to be displayed, and apply row styling to the table. When row styling is applied, a green background is used in every alternate row in the table. You can change the color if you wish. Row styling makes the table easier to read.

A Table view is added to the results automatically, as the second view. However, you can delete the Table view if you wish.

The grand total for columns with the Average aggregation rule will differ in the Table and Pivot Table views. In the Table view, the grand total for a column with an Average aggregation rule is calculated from the database (as a sum divided by a count). In the Pivot Table view, the grand total is the average of the rows in the result set.

The following procedure describes how to edit a Table view.

To edit a Table view

1. If the view is not already in the compound layout, then add the view.

   For instructions on adding views, see Adding and Editing Views (on page 1004).
2. In the Results tab of the analysis editor, click the Edit View icon for the Table view.

   The Table view editor opens.
3. In the Layout pane, drag fields and drop them into the drop targets as necessary.
4. To specify totals, perform the following actions:

   NOTE: By default, no totals are specified, and the tooltip for the totals icon is No Totals. When you add a total, the tooltip changes accordingly.

   - To add a grand total, in the Columns and Measures section of the Layout pane, click the totals icon and select the location for the total.
   - To add totals for an individual column, click the totals icon for that column and select the location for the total. Then, click the More Options icon for the column, select Aggregation Rule, and make sure that the Report-Based Total option is selected.

   NOTE: The totals icon is available only for columns that can be *totaled by*. Typically, this is a column that has repeated values that would be summed for a total. Also, if the option Report-Based Total option is not selected, then the system calculates the total based on the entire result set, before applying any filters to the measures.
5. To edit the properties for a column, or to specify formatting to apply if the contents of the column meet certain conditions, click the More Options icon for the column and select Column Properties.

   The Column Properties dialog box opens, where you can make your selections. For information about formatting columns and adding conditional formatting, see Editing Column Properties (on page 983).
6. To edit the section properties:
   a. Click the Section Properties icon.
   b. Make your selections for the properties and then click OK.
7. To edit the properties for the table, click the Table View Properties icon in the toolbar.
8. In the Table Properties dialog box, make your selections for the properties, and then click OK.

   You can specify the following:

   - The method to be used to browse data, either scrolling or paging controls.
   - The column heading format and whether the subject area name is included in the column heading.
   - Whether null values are displayed.
   - Whether row styling is used.

     If you want to change the color to be used for the background in the alternate rows, then click the formatting button beside the Row Styling check box and select the color you want.

- Whether duplicate values are displayed.
- Whether master-detail linking is used.

9 When you finish making changes, click Done to close the Table view editor.

10 Save the analysis.

Showing Results in Performance Tile Views

A Performance Tile view displays a single aggregate measure value that immediately reveals summary metrics. This view can help to do the following:

- Focus the user's attention on simple, need-to-know facts directly and prominently on the tile.
- Communicate status through simple formatting by using color, labels, and limited styles, or through conditional formatting of the background color or measure value to make the tile visually prominent. For example, if revenue is not tracking to target, then the revenue value may appear in red.
- Respond to prompts and filters to make the results more relevant to the user.
- Support a single, aggregate or calculated value.

You must set up aggregation and filters in the Criteria tab to ensure that the correct measure value is displayed in the tile. If one or more measures are included in the analysis on the Criteria tab, then the first measure on the Criteria tab is selected for the Performance Tile view by default. If no measure has been added to the analysis, then you can add one when you edit the Performance Tile view. You can add multiple Performance Tile views to a compound layout, with one measure displayed in each Performance Tile view.

To edit a Performance Tile view

1. If the view is not already in the compound layout, then add the view.

   For instructions on adding views, see Adding and Editing Views (on page 1004).
2. In the Results tab of the analysis editor, click the Edit View icon for the Performance Tile view.

   The Performance Tile view editor opens.
3. To add a measure or to change the measure for the view, do the following:
   a. To use a measure that is not already present in the analysis, drag the new measure from the Subject Areas pane and drop it in the Measures drop target.
   b. To select a different measure from the measures that are already present in the analysis, select the measure from the drop-down list in the Measures drop target.
4. In the Styles pane, select the size for the performance tile and select a theme style.
5. Click the Performance Tile Properties icon in the toolbar.
6. In the Performance Tile Properties dialog box:
   a. Make your selections.
   b. If you want to change the defaults carried over from the Criteria page or to add conditional formatting, then click the Edit Conditional Formatting link to open the Conditional Formatting dialog box.
7. When you finish making changes in the Performance Tile Properties dialog box, click OK.
8. Click Done to close the Performance Tile view editor.
9. Save the analysis.

Showing Results in Treemap Views

Treemap views organize hierarchical data by grouping the data into rectangles known as tiles. Treemap views have the following characteristics:

- They are limited by a predefined area and display two levels of data.

- They can contain rectangular tiles. The size of the tile is based on a measure, and the color of the tile is based on a second measure.
- They are similar to a scatter plot graphs in that the map area is constrained, and the graph allows you to visualize large quantities of data and quickly identify trends and anomalies within that data.

Two styles of Treemap view are available:

- **Percentile Binning.** Specifies that the color of the tiles within the Treemap view is displayed as a percentile bin.
- **Continuous Color Fill.** Specifies that the tiles within the Treemap view are displayed as a gradient color scheme. The low value gradient color is the minimum value for the selected Color By measure. The high value gradient color is the maximum value for the selected Color By measure.

To edit a Treemap view

1. If the view is not already in the compound layout, then add the view.

   For instructions on adding views, see Adding and Editing Views (on page 1004).
2. In the Results tab of the analysis editor, click the Edit View icon for the Treemap view.

   The Treemap view editor opens.
3. In the Layout pane, in the Style field, select either Percentile Binning or Continuous Color Fill.
4. If you selected Percentile Binning in the previous step, then in the Bins list, select the number of bins to display in the Treemap view.

   You can select an integer, Quartile (4), or Decile (10). Values range from 2 to 12. The number of bins selected corresponds to the number of colors in the Treemap view.
5. Change the Group By, Size By, and Color By options as necessary to meet your requirements.
6. Click the Treemap View Properties icon in the toolbar.
7. In the Treemap Properties dialog box, make your selections, and then click OK.
8. Click Done to close the Treemap view editor.
9. Save the analysis.

Showing Results in Trellis Views

A Trellis view displays multidimensional data as a set of cells in a grid, with each cell displaying a subset of data shown as graphs or numbers. The following types of Trellis views are available:

- **Simple Trellis.** Simple Trellis views are appropriate if you want to compare like to like in a set of data. A Simple Trellis view displays a single inner graph type, for example a grid of multiple Bar graphs. The inner graphs always use a common axis; that is, the graphs have a synchronized scale.
- **Advanced Trellis.** Advanced Trellis views are appropriate if you want to monitor trends and see patterns in a set of data. An Advanced Trellis view displays a grid of small spark graphs. Measures can be shown as numbers or represented in various types of spark graphs. In an Advanced Trellis view, each measure column operates independently for drilling, axis scaling, and so on.

You can use the following types of graphs in Simple Trellis views:

- Bar (subtype Vertical)
- Bar (subtype Horizontal)
- Line
- Area
- Line-bar
- Pie
- Scatter

- Bubble

You can use the following types of visualizations in Advanced Trellis views:

- Numbers
- Microcharts of the following subtypes:
  - Spark bar
  - Spark line
  - Spark area

To edit a Trellis view

1. If the view is not already in the compound layout, then add the view.

   For instructions on adding views, see Adding and Editing Views (on page 1004).
2. In the Results tab of the analysis editor, click the Edit View icon for the Trellis view.

   The Trellis view editor opens.
3. In the Layout pane, drag fields and drop them into the drop targets as necessary.
4. Click the Trellis Properties icon in the toolbar.
5. In the Trellis Properties dialog box, make your selections.

   You can specify the following:
   - Properties related to the grid canvas, such as legend location (Simple Trellis views only)
   - Properties related to graph size for the visualizations included in the Trellis view
   - Properties that specify the method to be used to browse data — either scrolling or paging controls
   - Whether the Trellis view listens to master-detail events
   - Properties that control the appearance of the grid for the Trellis view and its visualizations, such as various style choices and the way that legends are displayed
   - Properties that control the type of scale and the appearance of scale markers for each of the visualizations in the Trellis view (Simple Trellis views only)
   - Properties that control the display of titles and labels (Simple Trellis views only)
6. When you finish making changes, click OK.
7. Click Done to close the Trellis view editor.
8. Save the analysis.

Showing Results in Graph Views

Use the Graph view to represent data as a graph. The following table shows the types of graphs that are available and describes their uses. It also shows the available styles for each type. All graph types except for scatter, radar, and microchart can be 2-dimensional (2D) or 3-dimensional (3D). Not all types of graphs are appropriate for all types of data.

Graph Type	Graph Subtype	Description	Styles
Bar	- Vertical - Horizontal - Stacked Vertical - Stacked Horizontal 100% Stacked Vertical	A bar graph shows quantities associated with categories. Bar graphs show quantities as bar lengths and categories as bars or groups of bars. Bar graphs are useful for comparing differences among similar items. For example, you can compare competing product sales, same product sales during	- Rectangle - Triangle - Cylinder - Diamond - Gradient - Pattern Fill

Graph Type	Graph Subtype	Description	Styles
	■ 100% Stacked Horizontal	different periods, or the same product sales in different markets. Bar graphs can be used to compare measure columns by showing bars in a horizontal or vertical direction.	
Line	None	A line graph shows quantities over time or by category. Line graphs are useful for showing trends over time. They can be used to plot multiple measure columns.	■ Standard Line ■ Stepped Line ■ Curved Line
Area	■ Stacked ■ 100% Stacked	An area graph shows the trend of the contribution of each value over time or by category. An area graph is a line graph for which the regions between lines are filled in. The regions stack, adding up to the total value for each time period or category. In 100% stacked graphs, each category is displayed as a percentage contribution to the total value.	■ Solid Fill ■ Gradient Fill ■ Pattern Fill
Pie	None	A pie graph shows data sets as percentages of a whole. Pie graphs are useful for comparing parts of a whole, such as sales by region or by district.	■ Solid Fill ■ Gradient Fill ■ Pattern Fill
Line-Bar	■ Standard ■ Stacked	A line-bar graph plots two sets of data with different ranges: one set as bars, and one set as lines overlaid on the bars. Line-bar graphs are useful for showing trend relationships between data sets.	■ Rectangle ■ Triangle ■ Cylinder ■ Diamond ■ Gradient ■ Pattern Fill
Time Series Line	None	A time series line graph plots time series data. It scales the horizontal axis based on the time that has elapsed between data points.	■ Standard Line ■ Stepped Line ■ Curved Line

Graph Type	Graph Subtype	Description	Styles
Pareto	None	A pareto graph is a form of bar graph and line graph that displays criteria in descending order. In this graph type, the line shows a cumulative total of the percentages. Pareto graphs are useful for identifying significant elements, such as best and worst or most and least	- Rectangle - Triangle - Cylinder - Diamond - Gradient - Pattern Fill
Scatter	None	A scatter graph displays x-y values as discrete points, scattered within an x-y grid. It plots data points based on two independent variables. A scatter graph allows you to plot large numbers of data points and observe the clustering of data points. Scatter graphs are useful for observing relationships and trends in large data sets. **TIP:** To create a scatter graph, plot one fact on the x-axis, and plot another fact on the y-axis. These facts are plotted for selections on the Level axis.	- Standard Scatter - Scatter-with-Lines
Bubble	None	A bubble graph is a variation of a scatter graph that displays data elements as circles (bubbles). It shows three variables in two dimensions. One value is represented by the location of the circle on the x-axis. Another value is represented by the location of the circle on the y-axis. The third value is represented by the relative size of its circle. Bubble graphs are useful for plotting data with three variables and for displaying financial data during a period. **TIP:** To create a bubble graph, plot one fact on the x-axis, another fact on the y-axis, and a third fact on the bubble radius axis. These three facts are plotted for selections on the Level axis.	None
Radar	None	A radar graph plots the same information as a bar graph, but instead displays data radiating from the center of the graph. Each data element has its own value axis. Radar graphs are useful for examining the overlap and distribution of data.	None
Microchart	- Spark Line - Spark Bar	Each of these graph types is a text-sized graphic (of similar size to a piece of nearby	None

Graph Type	Graph Subtype	Description	Styles
	■ Spark Area	text) that displays only in the context of a Trellis view and that is ideal for showing trend information. A microchart graph type is useful within an advanced trellis, where data is displayed as a mixture of spark graphs and numbers. A microchart does not have axes or legends. Like larger graphs, a microchart's measure values are rendered as relatively sized bars (or lines, or area). Each measure name is displayed in its column header. Further details of the measure appear as tooltip text when you hover your pointer over a data cell.	
Waterfall	None	A waterfall graph allows you to show how a value increases or decreases sequentially and cumulatively. A waterfall graph helps to focus the user's attention on how each measure contributes to the overall total, and communicates this through formatting using color. An initial value is summed with subsequent values (both negative and positive differences or changes) to arrive at a total. There is only one total per waterfall graph and subtotals can be added.	■ Three Color (Increase, Decrease, and Total) ■ Four Color (First, Increase, Decrease, and Total) ■ Single Color ■ Dual-Color ■ Custom

NOTE: Oracle CRM On Demand uses a third-party graphing engine. The type of the graph, its size, and the number of elements graphed can affect whether axes or legends are displayed. Whether axes or legends are displayed is constrained by the amount of available space on the Web browser page. Sometimes, by adjusting the width and height controls, you can make axes and legends appear in the graph.

NOTE: If you select a graph that is incompatible with the results, no results are shown.

The following procedure describes how to edit a Graph view.

To edit a Graph view

1. If the view is not already in the compound layout, then add the view.

   For instructions on adding views, see Adding and Editing Views (on page 1004).
2. In the Results tab of the analysis editor, click the Edit View button for the Graph view.

   The Graph view editor opens.
3. In the Layout pane, drag fields and drop them into the drop targets as necessary.

   For more information about drop targets, see About Drop Targets in View Editors (on page 1005).

   TIP: You can add columns to the analysis while you are in the Graph view editor, by selecting the name of the field for the column in the Subject Areas pane and dragging it to a drop target. Alternatively, you can navigate to the Criteria tab to add additional columns. For information about adding columns in the Criteria tab, see Adding Columns to Analyses (on page 976). Any columns that you add in the Graph view editor are added to the analysis overall; you can see the columns in the Criteria tab and in other views, as well as in the Graph view. However, you cannot delete a column from the analysis while you are working in the Graph view editor.

To delete a column from the Graph view and from the analysis, you must navigate to the Criteria tab, and select Delete from the drop-down list of options for the column.

4 Click the Edit graph properties icon in the toolbar.
5 In the Graph properties dialog box, specify the properties that you want.
You can specify the following:
- Properties related to the canvas for the Graph view, such as width, height, and legend location
- Properties that control the appearance of the Graph view, such as the style

NOTE: You can format the appearance of a graph in two ways: based on the position of the graph elements, and based on conditions applied to columns. More information about formatting the appearance of graphs based on settings is provided later in this topic.

- Properties for the axis limits and tick marks
- Properties that control the display of titles and labels for the graph

6 When you finish making your changes, click OK to close the Graph properties dialog box.
The graph refreshes. The graph might resize to accommodate your selections.
7 Click Done to close the Graph view editor.
8 Save the analysis.

Formatting the Appearance of Graphs

You can format the appearance of a graph based on either of the following settings:

- The position of the graph elements (such as lines or bars in a line-bar graph or slices in a pie graph). Positional formatting enables you to customize the appearance of a graph based on the position of graph elements; that is, the numeric sequence in which graph elements (for example, bars) are displayed in a group. A group is determined by the attribute columns that are displayed in the Group By drop target area in the Graph view editor.
- Conditions applied to columns. Conditional formatting is applied to the column values that meet the condition. You can specify a color in which to display graph data based upon a specific column value, or a range of column values that meet the condition specified for the column.

The following procedure describes how to format the appearance of a graph.

To format the appearance of a graph

1 In the Results tab of the analysis editor, click the Edit View icon for the Graph view.
2 In the Graph view editor, click the Edit graph properties icon in the toolbar.
3 In the Graph properties dialog box, click the Style tab.
4 Click the Style and Conditional Formatting link to open the Style and Conditional Formatting dialog box.
5 To format the appearance of a graph based on the position of the graph elements, do the following:
   a Click the Style Formatting tab.
   b Select the tab for the graph element (for example, Bar) to which you want to add a custom formatted position.
   c Click the Add new position (green plus sign) icon.
   d In the Custom Formatted Positions table, specify the formatting for the new position entry. For example, to select the color to be applied to the position, click the down arrow next to the Color box to access the Color Selector dialog. (Note that the formatting options depend on the element.)
   e Click OK.
6 To format the appearance of a graph based on a condition that is applied, do the following:
   a Click the Conditional Formatting tab.

b Click Add Condition Format and select the column to which you want to apply a condition.

c In the New Condition dialog, select the operator and enter a column value, or a range of column values for this condition.

d Click OK.

e In the Conditional Formatting tab, to select the color to be applied to column values when the condition is met, click the down arrow next to the Color box to access the Color Selector dialog.

NOTE: If you specify multiple conditions, then all of the conditions are evaluated and the formats for the conditions that are true are merged. If there is a conflict between the formats, then the condition that is last verified as true determines the format that is displayed.

f Click OK.

7 When you finish making changes, click OK to close the Graph properties dialog box.

8 Click Done to close the Graph view editor.

9 Save the analysis.

Showing Results in Pivot Table Views

The Pivot Table view is an interactive view that allows you to rotate the rows, columns, and section headings to obtain different perspectives of the data. Pivot tables are navigable and drillable, and are especially useful for trend reports.

This topic describes the pivot table positions and provides instructions for performing the following tasks:

- Adding or modifying pivot table views
- Using multiple page drop-down lists in pivot tables
- Overriding the default aggregation rules in pivot tables
- Adding formatting to pivot tables
- Displaying running sums in pivot tables
- Showing items as relative values in pivot tables
- Using calculations in pivot tables
- Building calculations in pivot tables

Pivot Table Positions

When you add or modify a pivot table, the columns included in the analysis appear as elements in the pivot table template.

The following table describes the pivot table positions.

Position	Description
Pivot Table Prompts	Provides an interactive result set that allows users to select the data they want to display. The values from the columns that appear in the Pivot Table Prompts position are used as the initial filter criteria. The values appear in a drop-down list for selection. Based on that selection, a pivot table (composed of the Sections, Columns, Rows, and Measures defined in the pivot table) appears.
Sections	Populates the areas that divide the view into sections. For each value in the Section column, a unique pivot table appears, composed of the Columns, Rows, and Measures defined in the pivot table.

Position	Description
Columns	Shows an element in a column orientation. Pivot tables can contain multiple columns.
Rows	Shows an element in a row orientation. Like columns, pivot tables can contain multiple rows.
Measures	Populates the section of a pivot table that contains summary data. The elements in the Measures area are summarized based on the elements in the page, section, row, and column fields. Each value in the Measures elements represents a summary of data from the intersection of the source rows and columns. The Measure Labels element, which appears in the Columns area by default, controls the position and formatting of the column heading for the data in the Measures section. It also provides totaling and ordering capabilities. If there is only one measure, this element can be excluded.
Excluded	Excludes columns from the pivot table results. Any column that is added as criteria for the report after the pivot table has been created is added as excluded.

Adding or Modifying Pivot Table Views

The following procedure provides the basic steps to add or modify a Pivot Table view.

To add or modify a Pivot Table view

1 In the Results tab perform one of the following actions:
- To add a new pivot table view, click New View, and then select Pivot Table.
- To edit an existing pivot table view, click the Edit View button for the pivot table view.

The Layout pane shows the options and settings for the view.

2 To rearrange columns, hover the pointer over the column title until the drag bar appears above the title, then drag the bar to a new location.

3 To add a graph view to the pivot table, click the graph icon in the toolbar.

After you have added a graph to the pivot table, you can change the position of the graph, change the graph type, and so on. For information about the graph view, see Showing Results in Graph Views (on page 1012).

4 To add totals, perform the following actions:

a For totals in the Pages, Sections, Rows, and Columns areas, click the Totals button and make a selection:
- For no totals, select None. The Totals button appears with a white background (default).
- To show the total before or after the data items, select Before or After. For example, if you add a total on a row containing regions and specify the Before option, the total is shown before individual districts in the region are listed.

b For totals in the Measures area, click the More Options button for the row or column to be totaled, select Aggregation Rule, select a value, and make sure the option Report-Based Total is selected.

NOTE: If the option Report-Based Total is not selected, Oracle CRM On Demand calculates the total based on the entire result set, before applying any filters to the measures.

Depending on which totals are selected at the rows or columns level, the totals for the summary data represented by the Measures elements display as a column or row. Column and row totals include labels.

When the Totals button is dimmed, no totals will appear.

5 To work with additional options for a column, measure, or row, click the More Options button and make a selection from the drop-down list.
6 To format labels or values for a column, click the Totals button or the More Options button, and then select the appropriate format option.
7 Save the report and then click Done.

Using Multiple Drop-Down Prompts in Pivot Tables

When you place multiple attributes in the Pivot Table Prompts area in the pivot table, you can create a multiple drop-down prompts page. Then, when users view the pivot table, they see multiple drop-down prompts for each attribute.

When the report is saved, the drop-down prompts will be available to users with access to the report.

Overriding Default Aggregation Rules in Pivot Tables

You can override the default aggregation rule for a measure, which is specified by either the original author of the report or by the system.

To override the default aggregation rule for a measure in a pivot table

1 Click the More Options button for the measure whose default aggregation rule you want to override.
2 Select the option Aggregation Rule, and then select the aggregation rule to apply.

Adding Formatting in Pivot Tables

You can apply green bar styling and cosmetic formatting to a pivot table. You can also customize the appearance of sections, rows, columns, measures, and the content that they contain.

For example, you can specify font, cell, border, and style sheet options for sections, values, and measure labels. For sections, you can include and customize the position of column headings together with the values in that section. You can also insert page breaks, so that every time a value changes in the section, the new section appears on a new page.

You can also add conditional formatting, which helps direct attention to a data element if it meets a certain threshold. To add conditional formatting to a column in a pivot table, see Editing Column Properties (on page 983).

Adding Green Bar Styling and Cosmetic Formatting to a Pivot Table

Green bar styling shows alternating rows or columns in a light green color. Cosmetic formatting affects the overall appearance of the pivot table and also allows you to change the default green bar color.

To add green bar styling and cosmetic formatting to a pivot table

1 In the pivot table view, click the Pivot Table View Properties button near the top of the workspace.
2 To add green bar styling, select the Enable alternating styling check box.

   To change the way the styling is applied, make a selection from the Alternate list.
3 To add cosmetic formatting, click the Format button.
4 In the Alternate Row Format dialog box, to change the default green bar color, select a new background color for the cell format.

   For more information about cosmetic formatting, see Applying Cosmetic Formatting in Analyses and Dashboards (on page 974).

Adding Formatting for Sections and Section Content

Section and content formatting options allow you to do the following:

- Include and customize the position of column headings together with the values in that section.
- Insert page breaks. Every time a value changes in the section, that new section will appear on a new page. This is useful for data-driven detail reports.
- Apply cosmetic formatting to a section and its content.

To add formatting for sections in a pivot table

1. To format the appearance of a section, do the following:
   a. Click the Edit View button in the pivot table view and click the Section Properties button.
   b. In the Section Properties dialog box, make your selections, and click OK.
2. To format the appearance of the section content, do the following:
   a. For each field you wish to format, click the More Options button and choose Column Properties from the drop-down menu.
   b. In the Column Properties dialog box, make your selections and click OK.

   For information about applying cosmetic formatting, see Applying Cosmetic Formatting in Analyses and Dashboards (on page 974).

Adding Formatting for Rows

Row and row content formatting options allow you to do the following:

- Apply cosmetic formatting to rows, row headings, and row values.
- Use a row in pivot table calculations but suppress its display in results.
- Define a new calculated item for use in a pivot table.
- Duplicate the row in the pivot table.
- Remove a column from the pivot table view.

To add formatting for rows

- In the pivot table view, click the More Options button for the row and make a selection from the drop-down list:
  - To apply cosmetic formatting to row headings or values, select the appropriate option.
  - For information about applying cosmetic formatting, see Applying Cosmetic Formatting in Analyses and Dashboards (on page 974).
  - To hide a row from the output, select Hidden.
  - To define a new calculated item, click New Calculated Item.

    For more information on defining calculated items, see the Building Calculations in Pivot Tables section of this topic.
  - To duplicate the row in the pivot table, select Duplicate Layer.
  - To remove the column from the report, select Remove Column.
  - The column is removed from the pivot table and all other result views for the report.

  NOTE: The Data Format settings for columns included in the Measures area inherit the settings for columns in the section.

Displaying Running Sums in Pivot Tables

Numeric measures in a pivot table can be displayed as running sums, where each consecutive cell for the measure displays the total of all previous cells for that measure. This option is a display feature only that has no effect on actual pivot table results.

Typically, running sums would be displayed for duplicated columns or for measures for which the option to show data as a percentage of the column has been selected, with the last value being 100 percent. Running sums apply to all totals. The running sum for each level of detail is computed separately.

Column headings are not affected when the running sum option is selected. You can format the column heading if you want it to indicate that the running sum option is in effect.

The following usage rules are in effect for running sums:

- A running sum is incompatible with the SQL RSUM function (the effect would be a running sum of the running sum).
- All running sums are reset with each new section. A running sum does not reset at a break within a section or continue across sections.
- If a measure does not display in a single column or in a single row, the measure is summed left to right and then top to bottom. (The lower right cell will contain the grand total.) A running sum does not reset with each row or column.
- Rolling minimums, maximums, and averages are not supported.

To display a measure as a running sum

- In the Measures area, click the More Options button for the row or column to be summed and select the following option:

  Display as running sum

Showing an Item's Relative Value in Pivot Tables

You can dynamically convert a stored or calculated measure on a pivot table into a percent or an index. This shows the relative value of the item, compared to the total, without the need to explicitly create a calculation for it.

For example, if you are using a pivot table to examine sales by region, you can duplicate the sales measure and view it as a percentage of the total. This allows you to see the actual sales, and the percentage of sales, that each region accounts for.

You can view the measure as a percentage between 0.00 and 100.00, or as an index between 0 and 1. Deciding which method to use is at your discretion.

To show an item as a relative value in a pivot table

1. In the pivot table view, click the More Options button to make the column show as a relative value.

   The following step is optional. When you duplicate the measure in the pivot table, you can display both the total for the measure and its relative value. This eliminates the need to add the column twice on the Criteria tab to display the total and its relative value in the pivot table.
2. To duplicate the measure, choose Duplicate Layer.

   The measure appears a second time in the pivot table, with the same name. To rename the measure, click More Options and choose Format Headings, then enter the new name in the first field.
3. Click More Options and choose Show Data As, choose either Percent of or Index of, and then choose the appropriate submenu option.

   NOTE: The option Show Data As is available only for items that are stored or calculated measures.

   The options for Percent of and Index of are:

   - Column
   - Row
   - Section
   - Page
   - Column Parent
   - Row Parent
   - Layer (If you choose layer, then you must also choose a column in the report by which to group the percentages.)

Using Calculations in Pivot Tables

You can use calculations in a pivot table to obtain different views of the data. The calculations allow you to override the default aggregation rule specified in the system, and for an existing report, the aggregation rule chosen by the author.

The following table describes the calculations that you can use in pivot tables.

Calculation	Description
Default	Applies the default aggregation rule as defined in the repository or by the original author of the report.
Sum	Calculates the sum obtained by adding up all values in the result set. Use this on items that have numeric values.
Min	Calculates the minimum value (lowest numeric value) of the rows in the result set. Use this on items that have numeric values.
Max	Calculates the maximum value (highest numeric value) of the rows in the result set. Use this on items that have numeric values.
Average	Calculates the average (mean) value of an item in the result set. Use this on items that have numeric values. Averages on pivot tables are rounded to nearest whole number.
First	In the result set, selects the first occurrence of the item.
Last	In the result set, selects the last occurrence of the item.
Count	Calculates the number of rows in the result set that have a nonnull value for the item. The item is typically a column name, in which case the number of rows with nonnull values for that column are returned.
Count Distinct	Adds distinct processing to the Count function. This means that each distinct occurrence of the item is counted only once.
Formula	Opens a toolbar that lets you select mathematical operators to include in the calculation.
Server Complex Aggregate	This setting forces the aggregation rule to be determined and calculated by the Analytics Server, rather than the Pivot table. It issues an 'AGGREGATE(x by y)' statement which the Analytics server interprets to mean: use the most appropriate aggregation rule for measure 'x' to get it to level 'y'.
None	No calculation is applied.

For more information about SQL functions, see Using Functions in Analytics (on page 1047).

Building Calculations in Pivot Tables

You can build calculations for items in the Pages, Sections, Rows, and Columns areas.

To build a calculation for an item in a pivot table

1. In the Sections or Rows area, click the More Options button for the measure on which you want a calculation performed.
2. Select the option New Calculated Item.

   The Calculated Item window appears.
3. Assign a name for the calculation in the Display Label field.
4. To build a calculation other than a formula, select from the following options:
   - To build one calculation, select the function to work with from the Function drop-down list, and click on one or more items in the Values list to add them to the Selected field.
   - If you are averaging a column with a type of integer, change the formula for the column to cast it to a double (floating point) type. For example, if the current formula is x, change it to CAST(x as double).

     NOTE: Averages on pivot tables are rounded to the nearest whole number.
5. To build a formula, select the Custom Formula function in the Function drop-down list and enter the formula in the Selected field.

   NOTE: A formula creates a dynamic custom grouping within the pivot table. All measures referenced in a formula must be from the same logical column and must be present in the results. Formulas can be inserted into, or combined with, other calculations.

   The mathematical operators become visible. The operators are shown in the following table.

Operator	Description
+	Plus sign, for an addition operation in the formula.
-	Minus sign, for a subtraction operation in the formula.
*	Multiply sign, for a multiplication operation in the formula.
/	Divide By sign, for a division operation in the formula.
$	Dollar sign, for acting upon the row position of an item in a formula.
(	Open parenthesis, to signify the beginning of a group operation in the formula.
)	Close parenthesis, to signify the ending of a group operation in a formula.

   a. In the Selected field, build the formula by typing or clicking measure names, and clicking operators to insert them into the formula.
   b. Use parentheses, where appropriate.
6. When the calculation is complete, click OK.

   If any errors are detected, a message will appear. Correct the error and click Finished again.

Examples of Calculations in Pivot Tables

The examples and explanations in this section assume that you have a basic understanding of SQL and its syntax. The examples are hypothetical. Not all possible calculations are shown.

Example 1. This example obtains the value of the current measure, such as dollar sales, for each of the products SoftDrinkA, SoftDrinkB, and SoftDrinkC, and adds the values together.

```
sum('SoftDrinkA','SoftDrinkB','SoftDrinkC')
```

This is equivalent to selecting Sum from the Function drop-down list, and then typing or clicking ‘SoftDrinkA’, ‘SoftDrinkB’,‘SoftDrinkC’ to add them to the Function field.

Example 2. This example obtains the minimum current measure, such as dollars in sales, for SoftDrinkA or SoftDrinkB, whichever is lower.

```
min('SoftDrinkA','SoftDrinkB')
```

In Example 1 and Example 2, each functional calculation is performed for each item in the outer layer, such as the Product layer. For example, if Year and Product are laid out on an axis, and one of the preceding calculations is built on the Product layer, the results will be computed per year.

Example 3. This example obtains the values for each item in the outer layer, such as Year and Product, and adds them together.

```
sum(*)
```

Example 4. This example obtains the current measure, such as dollar sales, of the item from the first, second, and third rows, and sums them.

```
sum($1,$2,$3)
```

Instead of specifying a named item, such as SoftDrinkA, you can specify $n or $-n, where n is an integer that indicates the item’s row position. If you specify $n, the measure is taken from the nth row. If you specify $-n, the measure is taken from the nth to the last row.

For example, for dollar sales, $1 obtains the measure from the first row in the data set, and $-1 obtains the measure from the last row in the data set.

Example 5. This example adds sales of SoftDrinkA, SoftDrinkB, and SoftDrinkC.

```
'SoftDrinkA' + 'SoftDrinkB' + 'SoftDrinkC'
```

This is equivalent to the following calculation:

```
sum('SoftDrinkA','SoftDrinkB','SoftDrinkC')
```

Example 6. This example adds sales of SoftDrinkA with sales of diet SoftDrinkA, then adds sales of SoftDrinkB with sales of diet SoftDrinkB, and then returns the maximum of these two amounts.

```
max('SoftDrinkA' + 'diet SoftDrinkA', 'SoftDrinkB' + 'diet SoftDrinkB')
```

Showing Results in Gauge Views

Gauge views are useful for showing performance against goals. The following table shows the gauges available from the Gauge drop-down list and describes their uses. The default gauge is a dial gauge.

Gauge Type	Description
Dial	A dial gauge shows data using a dial with one or more indicator needles that change position to indicate where the data falls within predefined limits.
Horizontal Bar Vertical Bar	A bar gauge shows data using a single bar that changes color to indicate whether the data is within predefined limits.
Bulb	A bulb gauge shows data using a circle that changes color to indicate whether the data is within predefined limits. An array of bulb gauges is particularly useful for scorecard-type output.

Gauge Subtypes

Your selection for the gauge type determines which gauge subtypes are available. The dial gauge has no subtype. Gauge subtypes include the following:

- Bar gauges: Filled and LED-style. The default subtype is filled.
- Bulb gauges: 3-dimensional (3D) and 2-dimensional (2D). The default subtype is 3D.

Gauge Sizes

Gauge sizes include small, medium, large, and custom. The default size is medium.

The following procedure describes how to edit a Gauge view.

NOTE: If you select a gauge type that is incompatible with the results, no results are shown.

To edit a Gauge view

1. If the view is not already in the compound layout, then add the view.
   For instructions on adding views, see Adding and Editing Views (on page 1004).
2. In the Results tab of the analysis editor, click the Edit View icon for the Gauge view.
   The Gauge view editor opens.
3. In the Layout pane, drag fields and drop them into the drop targets as necessary.
4. In the Settings pane, set the thresholds.
5. Click the Edit gauge properties icon in the toolbar.
6. In the Gauge Properties dialog box, make your selections.
   You can specify the following:
   - Properties related to the gauge canvas, such as legend location
   - Properties that control the appearance of the gauge, such as the width and height of the gauge
   - Properties for gauge limits and tick marks
   - Properties that control the display of titles, footers, and labels for the gauge or gauges in the gauge set
7. When you finish making changes, click OK to close the Gauge Properties dialog box.
8. Click Done to close the Gauge view editor.
9. Save the analysis.

Showing Filters Applied to Analytics Results

Use the filters view to show the filters in effect for a report. For information about adding filters to a report, see Adding Filters to Columns in Analytics (on page 976).

To add or modify a Filters view

1. In the Results tab, perform one of the following actions:
   - To add a new filters view, click New View, and then select Active Filters.
   - To edit an existing filters view, click the Edit View button for the filters view.
   The workspace shows the filters view.
2. When you are done, click OK.
3. Save the report.

Adding Markup Text to Results

Use the Static Text view to add or edit markup text to appear with the results. You can add markup text that contains formatted text, ActiveX controls or JavaScript, sound bites, animation, specialized logos, and so on. The markup text may contain anything that is supported by your browser.

This section provides the procedure to add or modify a Static Text view and some examples of static text. If you find an example that is similar to what you want to do, you can copy it and tailor it to your needs.

To add or modify a Static Text view

1. In the Results tab, perform one of the following actions:
   - To add a new static text view, click New View, and select Static Text.
   - To edit an existing static text view, click the Edit View button for the static text view.

   The workspace shows the Static Text view.
2. Enter the markup text into the text box.

   To make text appear bold, in italics, or underlined, click the appropriate button to insert the beginning and ending HTML tags, and then type the text between the tags, or select the text first and then the formatting button.

   NOTE: To include a line break, use the Line Break button. Pressing Enter does not result in multiple lines of text.

   The following table describes several examples.

Static Text View Example	Description and Usage Notes

HTML text	Paste or type the HTML (or appropriate formatted text) into the text box. You can also click the HTML tag buttons. Based on the format of the text you are entering, markup tags may be used to control the format of the text. The following are some examples of what you can do:
	■ To set font size and color:
	`<FONT SIZE="4" COLOR="red">Red Text</FONT>`
	■ To combine tags for additional effects:
	`<B><FONT COLOR="red">Bold Red Text</FONT></B>`

ActiveX object	The Active-X object must be self-contained and supported by your browser. Paste or type the object into the HTML Text window, making sure to include the beginning and ending tags <object...> and </object>.
JavaScript or VBScript	The script must be self-contained and supported by your browser. Paste or enter the script into the text box, making sure to include the beginning and ending tags <script> and </script>.

Static Text View Example	Description and Usage Notes
Audio	Make sure you know where the audio clip is located. If the audio clip is for use in a shared environment, it must be located on a network drive accessible to all users. Use the HTML tag <EMBED> to add audio, in the following format: <EMBED SRC="audio" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED> where: - *"audio"* is the location and name of the audio clip. To add an audio clip located on your hard drive, the following HTML is an example: <EMBED SRC="c:\mycomputer\MIDIfiles \wakeup.mid" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED> To add the same audio clip from a shared location on your Web server, the following HTML is an example: <EMBED SRC="http://ourwebserver.company.com/ sounds/wakeup.mid" AUTOSTART="true" LOOP="true" HIDDEN="true"></EMBED>
Background image	The following example uses JavaScript. Make sure you know where the image to use as the background is located. If the image is for use in a shared environment, it must be located on a network drive or Web site accessible to all users. If the image is located in a shared dashboard files folder, the following is example HTML: <script language="javascript"> document.body.background = "http:// ourwebserver.company.com/ graphics/"NameOfGraphic";</script> where: - *NameOfGraphic* is the name of the file to use, such as bricks.gif or sand.jpg.

1. To apply cosmetic formatting to the font used in the static text view, click the Format View button.
2. To import the font formatting from a previously saved view, click the Import Formatting from Another Analysis button, and navigate to the saved view.

   Note: You can import formatting from reports that have formats from Step 2 (Creating Layouts). Formatting from Step 1 (Defining Criteria) cannot be imported.

3. When you are finished, click OK.
4. Save the report.

Adding Legends to Reports Using Legend View

Use the Legend view to document the meaning of special formatting used in a report, such as the meaning of custom colors applied to gauges.

For example, you may use conditional formatting in a report to show critical items in the color red and items that need attention in the color yellow. You can add a legend with text that documents the meaning of the colors and captions that summarize the appropriate action. You can use cosmetic formatting to make the background colors of the text match the colors in the conditional report.

To add or modify a legend view

1. In the Results tab, perform one of the following actions:
   - To add a new legend view, click New View, and select Legend.
   - To edit an existing legend view, click the Edit View button for the legend view.

   The workspace shows the legend view.
2. In the Captions field, select where you want the caption to be displayed.

   The options are Right, Left, or None. If you do not want a caption to be displayed, select None.
3. In the Legend Items per Row field, select the number of legend items that you want for each row.
4. (Optional) Enter a title for the legend, such as Legend.
5. In the first Caption text box, type the meaning of the condition, such as Requires Immediate Attention.
6. In the first Sample Text text box, type the first condition you want to document, such as Critical.

   You can use the common formatting dialog box to set the background color, such as red. Entering text is optional. You can just set a background color if desired.
7. To add another caption, click the Add Item button.
8. When you finish adding captions, click OK.
9. Save the report.

Allowing Users to Change Columns in Analyses (Column Selector View)

Use the Column Selector view to allow users to dynamically select columns to change the data that appears in an analysis. A *column selector* is a drop-down list that contains preselected columns. In a Column Selector view, you can attach one column selector to each column in an analysis, and you can attach multiple columns (attributes) to each column selector.

To edit a Column Selector view

1. If the view is not already in the compound layout, then add the view.

   For instructions on adding views, see Adding and Editing Views (on page 1004).
2. In the Results tab of the analysis, click the Edit View icon for the column selector view.

   The Column Selector view editor opens.
3. Select the Include Selector check box for each column in which you want a column selector to appear.
4. To attach a new attribute to a column selector:
   a. Select the column to which you want to attach the attribute.
   b. In the Subject Areas pane, double-click the name of the field for the attribute

   NOTE: When you attach attributes to a column selector in this way, the attribute columns are not added to the analysis in the Criteria tab. Instead, when you display the Criteria tab, you see that the column is now referred to as a column group, with the default column for the list shown. The default column is the one on which you created the drop-down list.

5 Enter a label for each selector.

NOTE: If you do not enter a label, users viewing the results will not see a label on the selector.

6 In the toolbar, in the Label Position field, select a position for the labels.

7 If you want results to be refreshed as soon as a user selects any new choice from a column selector, then select the Automatically refresh when a new column is selected check box in the toolbar. If you deselect this check box, then users see an OK button next to the column selectors, and must click OK to see the new results.

8 When you finish making changes, click Done to close the Column Selector view editor.

9 Save the analysis.

Allowing Users to Select a Specific View Using View Selector View

Use a View Selector view to select a specific view of the results from among the saved views. When placed on a report, the view selector appears as a drop-down list for users to select the specific result view they want to see.

To add or modify a View Selector view

1 In the Results tab, perform one of the following actions:

- To add a new view selector view, click New View, select Advanced, and then select View Selector.
- To edit an existing view selector view, click the Edit View button for the view selector view.

The workspace shows the view selector view.

2 (Optional) Type a caption for the view selector and indicate where the caption should appear relative to the view selector.

3 Make your selections for the view choices that you want to include in the view selector:

- Select views from the Available Views box, and move them to the Views Included box.
- In the Views Included box, click the Rename button to rename a selected view.

NOTE: The None view shows the selector only.

4 Select the Display Results check box to preview the view selector view.

5 Click OK to return to the Layout Views page.

6 To move or edit the view selector view (and other views, as required) on the page, do the following:

- To move the view to a different location on the page, drag the view, and drop it in the new location.
- To format the appearance of the view selector view, click the Format View button for the view.

  You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).
- To edit the view selector view, click the Edit View button for the view.
- To delete the view selector view, click the Delete View button for the view.

7 When you finish making your changes, save the report.

Showing Results in Funnel Views

Use the Funnel view to show results as a three-dimensional graph that represents target and actual values and levels by color. Typically, Funnel views are used to graphically represent data related to stages in a process, such as the amount of potential revenue shown for each sales stage.

Funnel views are well suited for showing actual compared to targets for data where the target is known to decrease (or increase) significantly per stage, such as a sales pipeline. You can click on one of the colored areas to drill down to more detailed information.

In Funnel views, the thresholds indicate a percentage of the target value, and colors provide visual information for each stage. By default, the Funnel view shows the following:

- All stages for which the actual value falls below the minimum threshold are colored in red.
- All stages for which the actual value falls below the maximum threshold are colored in yellow.
- All stages for which the actual value is greater than the maximum threshold are colored in green.

You can change the colors if you wish.

The following table describes the types of Funnel views that are available. The style of each can be either solid or gradient fill.

Layout	Description
Standard	A Standard Funnel view uses a standard shape with equal stage widths.
Non-Standard	A Non-Standard Funnel view uses a standard shape with unequal stage widths.
Last-Stage Only	A Last-Stage Only Funnel view uses a standard shape with equal stage widths. It is similar to a Standard Funnel view, except that the target value of every stage before the last stage is calculated based on the last stage target value and a constant called target factor.

The following procedure describes how to edit a Funnel view.

To edit a Funnel view

1. If the view is not already in the compound layout, then add the view.

   For instructions on adding views, see Adding and Editing Views (on page 1004).
2. In the Results tab of the analysis editor, click the Edit View icon for the Funnel view.

   The Funnel view editor opens.
3. In the Layout pane, drag and drop columns into the drop targets as necessary.
4. In the Settings pane, set the thresholds.

   The thresholds indicate a percentage of the target value. You can specify custom thresholds in percentages, or use dynamic thresholds. You can also change the colors that are used for each stage.
5. Click the Edit graph properties icon in the toolbar.
6. In the Graph properties dialog box, make your selections.

   You can specify the following:

   - Properties related to the graph canvas, such as width, height, and legend location
   - Properties that control the appearance of the graph, such as the style
   - Properties that control the display of titles and labels for the graph
7. When you finish making your changes, click OK to close the Graph Properties dialog box.
8. When you finish making changes, click Done to close the Funnel view editor.
9. Save the analysis.

Showing Results in Map Views

A Map view can display records that contain addresses as data points on a map, and show information from the analysis as tooltip text when you rest your pointer on the data points. When you add a Map view, you specify which attribute and measure columns you want to be displayed in the tooltip text.

The following table describes the components in Map views.

Component	Description
Feature	An entity with spatial and non-spatial attributes such as cities, rivers, and highways. A feature can be represented by a polygon, a line, or a point.
Format	Defines the rendering properties for a feature. For example, when the feature is represented by a point, the format defines the shape and color of the point. Formats are tied to a particular geographic level such as continent, country, region, state, or city.
Layer	Any collection of features and formats that have a common set of attributes and a location. There are two types of layers in Map views, as follows: - Predefined layers, which are collections of geometries that share common attributes. An example of a predefined layer is a layer that shows the U.S. states. You can include a number of predefined layers in a Map view. When you zoom in and out on the map, various layers are hidden or displayed. - Custom point layers, which apply data points to a map. You create a custom point layer to display records as data points, based on the latitude and longitude coordinates in the addresses on the records. The custom point layer always overlays any predefined layers that you add to the map.
Map	A map that consists of a background or template map and a stack of layers that are rendered on top of each other in a window.

The following considerations apply to Map views in Oracle CRM On Demand:

- You cannot edit the predefined features and you cannot add new features other than a feature for a custom point layer.
- You cannot edit the predefined formats and you cannot add new formats other than a format for a custom point layer.
- You cannot edit the predefined layers.
- Only the Variable Shape format is supported for custom point layers. Other formats are not supported.
- Three background maps are available for you to select. You cannot edit the background maps or create new background maps.
- Map views do not support hierarchical columns.
- You can create multiple custom point layers in a Map view. Each layer can be based on a different address and use different measures.
- The data points in custom point layers are always based on the latitude and longitude coordinates in addresses. Any record on which the latitude and longitude fields are not populated will not be displayed in the Map view, and if the latitude and longitude fields in an address are incorrectly populated, then the data point for that address in the Map view will not match other fields in the address, such as city, county, and so on.
- If your company wants to allow Oracle CRM On Demand to populate the latitude and longitude fields in addresses on records automatically, then geocoding must be enabled for the company. For more information about geocoding, see About the Geocoding of Address Information (on page 355).

Before you begin. To add a Map view, the analysis must include the Latitude and Longitude columns, and at least one measure.

To edit a Map view

1. If the view is not already in the compound layout, then add the view.

   For instructions on adding views, see Adding and Editing Views (on page 1004).
2. In the Results tab of the analysis editor, click the Edit View icon for the Map view.

   The Map view editor opens.
3. If you want to use a different background map, then select the map from the drop-down list of available maps in the toolbar.
4. Do one of the following:
   - To add a custom point layer, click New Map Format in the BI Data Layers pane, then select Variable Shape, and then select Custom Point Layer.
   - To edit an existing custom layer, hover your pointer over the layer name in the BI Data Layers pane, and then click the Edit icon.
5. In the Variable Shape (Longitude, Latitude) pop-up window, define the format for the custom point layer, as follows:
   a. (Optional) Change the name of the custom point layer.

      NOTE: If the Name Automatically check box is selected, then you must deselect it to make the Name field editable. When you first create a custom point layer, the Name Automatically check box is selected by default, and the layer is automatically given the same name as the first measure in the analysis.
   b. In the field labeled X, make sure that the Longitude field is selected.
   c. In the field labeled Y, make sure that the Latitude field is selected.
   d. Make sure that the Single Column check box is not selected. This check box is not applicable for custom point layers that are based on latitude and longitude.
   e. In the ToolTips field, select the columns and measures that you want to be displayed in the tooltip text.

      You can select any of the columns and measures that are included in the analysis.
   f. In the Shape field, select the shape for the data points on the map.

      You can choose to show the data points as triangles, circles, or diamond shapes.
   g. In the Vary Size By, select the measure that you want to display as the heading in the tooltip text.

      By default, the first measure in the analysis is selected, but you can select any of the measures that are included in the analysis. The size of the data point on the map increases or decreases according to increases or decreases in the measure.
   h. Select the maximum and minimum size, the color, and the transparency for the data points.
   i. If you want the color of the data points to vary depending on the value of the measure that you selected in the Vary Size By field, then select the Vary By Measure check box.
   j. Click OK.
6. In the Map Features pane, select the features for the layers that you want to add to the map, or deselect the features for any layers that you want to remove from the map.
7. Click the Map Properties icon in the toolbar of the Map view editor to specify additional map properties, for example, canvas size, distance indicator, and so on.
8. When you finish making changes, click Done to close the Map view editor.
9. Save the analysis.

Adding Narrative Text to Results

Use the narrative view to add one or more paragraphs of text to appear with the reports. Narrative text is useful for providing information such as context, explanatory text, or extended descriptions. You can perform the following actions in the narrative view:

- Type a sentence with placeholders for each column in the results.
- Specify how rows should be separated.
- Use formatting buttons to make text bold, italic, or underlined, and insert line breaks.
- Apply cosmetic formatting to the fonts used in the narrative view, or import the font formatting from a previously saved view.

Example Usage Scenario for Narrative Text View

A user creates a report that returns the region name in the second column as part of the result set. The user wants the narrative view to appear as shown in the following example, with introductory text and each region listed on a new line:

This report shows your sales by region. The regions are:

East Region

West Region

The following table lists and describes the user's narrative view entries:

Field	Entry	Explanation
Prefix	[b] This report shows your sales by region. The regions are:[/b][br][br]	The entry prefixes the narrative with text. The text is formatted to appear in bolded type and is followed by two line breaks. The user positions the cursor into the Prefix text box and clicks the bold text button (**B**) to insert the tags to begin and end bolded text. The user types the following text between the tags: This report shows your sales by region. The regions are: The user then clicks the Line Break button twice.
Narrative	@2	The entry includes the results from the second column (the region name) in the narrative text. The user positions the cursor into the Narrative text box and types the characters @2.
Row Separator	[br]	The entry starts each row of the narrative text on a new line. The user positions the cursor into the Row Separator text box and clicks the Line Break button twice.
Postfix	[br][b] End of Sales by Region report[/b]	The entry appends text to the narrative, in the same manner as the Prefix.

Reserved Characters in the Narrative View

In the narrative view, the following characters are reserved characters:

@ (at sign, unless used as a column placeholder in the Narrative text box)

[(left bracket)

] (right bracket)

‘ (single quote)

\ (back slash)

NOTE: If you want to include a reserved character, precede it with a backward slash character (\) to escape it. For example, to include a backward slash character in narrative text, type \\.

Adding or Modifying Narrative Views

The following procedure provides the steps to construct a narrative view.

In the Prefix, Narrative, and Postfix text boxes, you can use the formatting buttons to make text appear in bold, italic or underlined type.

NOTE: To include a line break, use the Line Break button. Pressing Enter does not result in multiple lines of text.

To add or modify a narrative view

1. In the Results tab, perform one of the following actions:
   - To add a new narrative view, click New View, select Advanced, then select Narrative.
   - To edit an existing narrative view, click the Edit View button for the view.

   The workspace shows the options and settings for the narrative view.
2. Enter your selections for the fields in the workspace.

   The following table describes the fields.

Narrative View Workspace Field	Comments
Prefix	Specifies the header for the narrative. This text appears at the beginning of the narrative.
Narrative	Indicates the narrative text that will appear for each row in the results. Use @n to include the results from the designated column in the narrative. For example, @1 inserts the results from the first column in the narrative, and @3 inserts the results of the third column.
Row separator	Specifies a row separator tag. To use a separator other than the default for the format, enter the desired row separator in the Row Separator text box.
Postfix	Specifies the footer for the narrative. The text appears at the end of the narrative.

3. To apply cosmetic formatting to the font used in the narrative view, click the Format View button.
4. To import the font formatting from a previously saved view, click the Import Formatting from Another Analysis button, and navigate to the saved view.

   Note: You can import formatting from reports that have formats from Step 2 (Creating Layouts). Formatting from Step 1 (Defining Criteria) cannot be imported.
5. Select the Display Results check box to preview the narrative view.

6 Click OK to return to the Layout Views page.
7 To move or edit the narrative view (and other views, as required) on the page, do the following:
   - To move the view to a different location on the page, drag the view, and drop it in the new location.
   - To format the appearance of the narrative view, click the Format View button for the view.

     You can specify Cell, Border, Background, and Additional Formatting Options (Width, Height, Indent, Right Padding, Top Padding, Bottom Padding).
   - To edit the narrative view, click the Edit View button for the view.
   - To delete the narrative view, click the Delete View button for the view.
8 When you finish making your changes, save the report.

Showing Results in Ticker Views

The Ticker view displays the results of a report as a marquee (moving results that scroll across the page). You can customize the size of the scroll area, the speed and direction in which the results scroll, and other display settings.

NOTE: If your Web browser does not support moving text, the results will appear, but they will not scroll across the page.

To edit a Ticker view

1 If the view is not already in the compound layout, then add the view.

   For instructions on adding views, see Adding and Editing Views (on page 1004).
2 In the Results tab of the analysis editor, click the Edit View icon for the ticker view.

   The Ticker view editor opens.
3 To generate default settings for the most commonly used fields, click Sample Template.

   CAUTION: If you click Sample Template after entering values in other fields, your entered values are cleared.
4 To clear all fields, click Clear Fields.

   NOTE: After you clear all fields, you can click Sample Template to restore default settings for the most commonly used fields.
5 Make your selections for the fields in the workspace.

   The following table describes the fields.

Ticker View Workspace Field	Description
Behavior	Specifies how the results move in the ticker: **Scroll.** The results start hidden, scroll on to the page, then off the page before repeating. **Slide.** The results start hidden, scroll on to the page, then stop when they reach the other side. **Alternate.** The results bounce back and forward inside the marquee.
Direction	Specifies the direction the results move in the ticker (Left, Right, Down, or Up).

Ticker View Workspace Field	Description
Width	Specifies the width of the ticker, either in pixels, or as a percentage of the page width. For example, a value of 200 indicates a width of 200 pixels, and a value of 25% indicates a width of one-quarter of the page.
Height	Specifies the height of the ticker, either in pixels, or as a percentage of the page height. For example, a value of 200 indicates a height of 200 pixels, and a value of 25% indicates a height of one-quarter of the page.
Beginning Text	Specifies any optional text to display at the beginning of each redraw of the results. You can use HTML to format the text.
Row Format	Specifies the HTML to use in formatting the rows in the results. To include the results from a designated column, use @n. For example, @1 inserts the results from the first column, and @3 inserts the results of the third column.
Row Separator	Specifies the character that separates one row from another.
Column Separator	Specifies the character that separates one column from another. This is used when Row Format is blank, which results in all columns being displayed.
Ending Text	Specifies any optional text to display at the end of each redraw of the results. You can use HTML to format the text.

NOTE: Several of these fields are pre-populated with HTML that provides initial formatting. Take care when editing this text, so that the original HTML is still valid. If you remove the HTML from one of the fields, you should remove it from the others, too, otherwise the ticker will not function correctly.

6 To specify additional options, perform the following actions:

a Click Advanced.

The Advanced Ticker Options dialog box appears.

b Make your selections for the advanced options and click OK.

The following table describes the advanced options.

Advanced Options in the Ticker View Workspace	Description
# of Loops	Specifies the number of times that the results will scroll. The default is an infinite number of times. You must specify a whole number.
Scroll Amount	Sets the number of pixels between successive redraws of the results. Larger values cause faster, less smooth scrolling.

Advanced Options in the Ticker View Workspace	Description
Scroll Delay	Specifies the number of milliseconds between successive redraws of the results. Large values cause slower scrolling.
Background Color	Specifies the color to use for the background. Depending on what your browser supports, you can enter a color name such as yellow or blue, or use the 6-digit hexadecimal format, such as #AFEEEE for pale turquoise. (You can omit the number sign character from the hexadecimal format.)
Additional Marquee Attributes	Specifies other marquee options that your browser may support, such as ALIGN="top | middle | bottom" to align the ticker to the top, middle or bottom of the text around it. You can also add HTML to further customize the look of the ticker.

7 When you finish making changes, click Done to close the Ticker view editor.

8 Save the analysis.

Specifying Right-Click Interactions for Users

You can specify which options are available in the menu that opens when users right-click on certain views in an analysis. For example, you can specify that menu options are available to allow users to move columns, to include columns, and to exclude columns.

These right-click interactions allow users to customize an analysis to show the data that is of most interest to them. When the analysis is part of a dashboard, users can save their customized version of the analysis so that they do not have to customize the analysis each time they view the dashboard.

The following types of right-click interactions can be enabled for an analysis:

- **Drill.** Allows users to drill into the data when drilling is not set as the primary interaction for a particular column.
- **Move columns.** Allows users to move the columns, to change the order of the columns, or to move the columns into sections or table prompts.
- **Sort columns.** Allows users to sort the data in columns.
- **Add or remove values.** Allows users to choose to keep only certain data, or to remove certain data.
- **Create, edit, or remove groups.** Allows users to create groups by selecting the column values that they want to be part of the group.
- **Create, edit, or remove calculated values.** Allows users to create calculated items, by selecting the column values that they want to be part of a group and then selecting the formula for the calculated item.
- **Display or hide subtotals.** Allows users to add subtotals after each record, or add the grand total.
- **Display or hide a running sum.** Allows users to display or hide a running sum. In a running sum, each consecutive cell for a measure displays the total of all previous cells for that measure.
- **Include or exclude columns.** Allows users to include or exclude columns.

The right-click interactions take effect in Pivot Table, Table, Treemap, and Trellis views at runtime. Not all right-click interactions are available for each view type at runtime.

NOTE: The right-click interactions that are supported for a view are always available to you in the analysis editor. However, only the right-click interactions that you enable are available at runtime and when you preview the analysis.

To specify which right-click interactions are available for users

1. In the Results tab or the Criteria tab of the analysis editor, click the Edit Analysis Properties icon in the toolbar.
2. In the Analysis Properties dialog box, click the Interactions tab.
3. Make your selections and then click OK.
4. Save the analysis.

Linking Master and Detail Views

You can establish a relationship between two or more views so that one view, called the master view, drives data changes in one or more other views, called detail views. A view becomes a master view when you set up the interaction of a column in the view to send master-detail events on designated channels. This column is the master column. When the master column is clicked in the master view, the definition of the cell (or item) that was clicked is passed through a channel to the detail view. This is referred to as a master-detail event.

A detail view is a view that listens for and responds to the master-detail events that are sent by a master view on a specified channel. A detail view includes one or more columns whose values are changed directly by the information passed by a master-detail event. These are the detail columns.

When a master-detail event is sent to a detail view, the master-detail event information is reviewed to determine which column in this information matches the detail column. When a match is found, the detail column is updated with the values from the master column, and then the entire detail view is refreshed.

The following types of views can be set up as master views or detail views:

- Funnel
- Gauge
- Graph
- Pivot table
- Table
- Trellis (only the outer edges, not the inner visualizations)

When setting up master and detail views, note the following considerations:

- A detail view can listen for master-detail events from multiple master views.
- A detail view cannot act as a master to another view.
- The master view and the detail view can be in the same analysis or in different analyses.
- You must use the same channel for both the master view and the detail view in a master-detail relationship.
- Any type of column (attribute or measure) can be a master column. However, a column that is in the Prompts drop target or the Sections drop target in the master view cannot be a master column. The master column must be placed in the body of the view.
- A detail column must:
  - Match a column in the master view.
  - Be in either the Prompts drop target or the Sections drop target of the detail view, depending on the type of view. For Table and Pivot Table views, it must be in the Prompts drop target. For Graph and Gauge views, it can be in either the Prompts drop target or the Sections drop target.

The following procedure describes how to set up a master view.

To set up a master view

1. In the Criteria tab of the analysis editor, in the drop-down menu for the column that you want to be the master column, select Column Properties.

2 In the Column Properties dialog box, click the Interaction tab.
3 In the Primary Interaction field in the Value section, select Send Master-Detail Events.
4 In the Specify channel field, enter a name for the channel on which the master view sends master-detail events. You can use any appropriate name, for example, Sales Analysis Channel, Channel 1, or channel 1.
5 Click OK to close the Column Properties dialog box.
6 Click the Results tab in the analysis editor, and then add the view that is to be used as the master view.

   The master view must include the master column.
7 Save the analysis.

The following procedure describes how to link a detail view to a master view.

To link a detail view to a master view

1 Edit the view that you want to be the detail view.

   NOTE: The detail view can be in the same analysis as the master view, or in a different analysis.
2 In the view editor, in the toolbar, click the icon to edit the view properties.

   For example, in a Table view, click the Table View Properties icon.
3 In the properties dialog box for the view, select the Master-Detail check box.

   TIP: The Master-Detail check box appears in the General tab of the Gauge Properties dialog box, the General tab of the Graph Properties dialog box, and the Style tab of the Table Properties dialog.
4 In the Event Channels field, enter the name of the channel on which the detail view is to listen for master-detail events.

   The Event Channels field is enabled only when you select the Listen to Master-Detail Events check box. Use this field to enter one or more channels on which the detail view is to listen for master-detail events raised by one or more master views. The channel name is case-sensitive and must exactly match the channel name specified in the master view. Separate channel names with a comma, for example, channel a, channel b.
5 Click OK to close the properties dialog box.
6 In the Layout pane, drag the column (or columns) to be the detail column (or columns) to either the Prompts drop target or the Sections drop target, as follows:
   - If the detail view is a Table or Pivot Table view, then drag the column or columns to the Prompts drop target.
   - If the detail view is a Graph or Gauge view, then drag the column or columns to the Prompts drop target or to the Sections drop target, whichever you prefer, unless the Graph or Gauge view has a column on the Prompts drop target. Then, you must drag the column or columns to the Prompts drop target.

   NOTE: You must drag and drop all detail columns to the same drop target. You cannot have some on the Prompts drop target and some on the Sections drop target.
7 Click Done.
8 Save the analysis.

Creating Groups and Calculated Items

You can create new column values using groups and calculated items. A *group* in Analytics is a static list of column values that you select, or a static or dynamic list that is generated by selection steps. A group is represented as a column value. All of the values that make up the group must be from the same column. Groups are always displayed at the bottom of the column list in the order in which they were added. Groups can contain column values or other groups. You can create a custom group and add the custom group to a column within a view.

A *calculated item* is a calculation between column values that is represented as a single value. You can use a calculated item to override the default aggregation rule that is specified in the repository, and for an existing analysis, the aggregation rule chosen by the creator of the analysis. You can define a calculated item using a custom formula, which is the default method, or by combining selected column values with a function, for example, SUM.

When you create a group or a calculated item, a selection step is automatically created. For more information about selection steps, see Creating Selection Steps (on page 1041).

You can save the groups and calculated items that you create in the relevant subject area folder in the catalog, so that they can be reused.

The following procedure describes how to create a group or calculated item from a view editor.

To create a group or calculated item

1 In the Results tab of the analysis editor, click the Edit View icon for the view for which you want to create a group or calculated item.
2 In the view editor, click the New Group or New Calculated Item icon in the toolbar.

   NOTE: You can also create a group or calculated item from the Selection Steps pane. For more information, see Creating Selection Steps (on page 1041).

3 In the New Group or New Calculated Item dialog box, specify the details for the group or calculated item.
4 Click OK to close the dialog box.
5 Click Done to return to the compound layout.
6 If you want to save the group or calculated item in the catalog, then do the following:
   a In the Selection Steps pane, click the link for the item that you want to save.
   b Select the save option for the item.
   c In the Save As dialog box, browse to the folder where you want to save the item.
   d Click OK to close the dialog box.

Creating Calculated Measures

A *calculated measure* in Analytics is a measure that is derived from other measures and created by using a formula. You can create calculated measures that apply to all of the views that contain calculated measures within a compound layout, and you can create calculated measures for individual views that contain columns.

To create a calculated measure

1 In the Results tab of the analysis editor, do one of the following:
   - To create a calculated measure for all of the views within a compound layout that contain columns, click the New Calculated Measure button in the toolbar.
   - To create a calculated measure for a single data view, click the Edit View icon for the view, and then click the New Calculated Measure icon in the toolbar of the view editor.
2 In the New Calculated Measure dialog box, specify the details for the calculated measure.
3 Click OK to close the dialog box.

NOTE: You cannot edit an existing calculated measure directly in the Results tab of the analysis editor. However, you can edit a calculated measure in the Criteria tab, using the drop-down list of options for the field for the measure.

Creating Selection Steps

Selection steps, together with groups and calculated items, allow you to limit, manipulate, or add to the results that are displayed in an analysis. Whereas filters are applied before a query is aggregated and therefore affect the query and the resulting values for measures, selection steps are applied after the query is aggregated and affect only the column values displayed and not the resulting aggregate values.

When you add a column to an analysis, a selection step is automatically created to start with all column values, unless you explicitly add specific values. Selection steps are also created automatically when you add columns to the analysis in the Results tab.

You can also create selection steps for an analysis in the Selection Steps pane of the Results tab. For the selection steps, you can define groups and calculated items, to group and define custom aggregations for selected column values of your choice.

NOTE: You can create selection steps for dimension columns only. You cannot create selection steps for measure columns.

If you enable certain right-click interactions for an analysis, then users who run the analysis can also define and apply their own selection steps to the analysis at runtime, by keeping, adding, or removing column values, and by adding custom calculated items or groups. For information about enabling right-click interactions, see Specifying Right-Click Interactions for Users (on page 1037).

The following procedure describes how to create selection steps in the Results tab of the analysis editor.

To create selection steps

1. In the Results tab of the analysis editor, if the Selection Steps pane is not visible, then click the Show Selection Steps pane icon in the toolbar.
2. If the Selection Steps pane is collapsed, then expand it.
3. In the steps for the column, click the Then, New Step link.
4. From the menu, select the option for the type of step that you want to create, and then specify the details in the dialog box that opens.

   TIP: If an appropriate group or calculated item has already been created and saved in the catalog, in a folder to which you have access, then you can select that group or calculated item for the step.

5. When you finish, click OK to close the dialog box.
6. To display the selection steps in the analysis, add a Selection Step view to the compound layout.

   For instructions on adding views, see Adding and Editing Views (on page 1004).

7. Save the analysis.

Creating Custom Messages for No Data in Analyses

If an analysis returns no data, then a default message is displayed. You can create a custom message that is used for the analysis instead of the default message.

To create a custom message for no data in an analysis

1. In the Results tab or the Criteria tab of the analysis editor, click the Edit Analysis Properties icon in the toolbar.
2. In the Analysis Properties dialog box, click the Results Display tab.
3. In the No Results Setting field, select Display Custom Message.
4. If the text that you want to enter contains HTML markup tags, then select the Contains HTML Markup check box.
5. Enter the text for the message header and the text for the message.

6 Click OK to close the Analysis Properties dialog box.
7 Save the analysis.

Step 3: Defining Analytics Prompts (Optional)

To allow users to specify a filter value when they run an analysis, define a runtime prompt for the analysis. Runtime prompts are useful because analyses may need to be filtered differently based upon different users or the dates that analyses are run.

A runtime prompt differs from a prebuilt filter in that a filter is set up when the analysis is defined and cannot be changed without revising the analysis itself. For example, if you define a prompt on Account Type for the report, your employees are prompted to select which Account Type value to see when they run the analysis. If you define the prebuilt filter as a specific Account Type, such as Competitor, the filter is hard-coded and cannot be altered by the user at run time.

You can create the following types of prompts from the Prompts tab in the analysis editor:

- Column prompt

  A column prompt provides general filtering of a column within an analysis. A column prompt can present all choices for a column, or, it can present constrained choices for a column.

  NOTE: You can create a maximum of one column prompt for any given column in an analysis.

- Currency prompt

  A currency prompt allows users to change the currency type in analyses that contain a currency column.

- Image prompt

  An image prompt provides an image that users click to select criteria for an analysis. For example, in a sales organization, users can click their territories from an image of a map to see sales information, or click a product image to see sales information about that product. Users who know how to use the HTML <map> tag can create an image map definition.

- Variable prompt

  A variable prompt allows users to select a value from a set of values that you specify in the prompt.

You can create multiple prompts of the same type and multiple prompts of different types for a single analysis.

Related Topics

See the following topics for related information:

- Adding Column Prompts in Analytics (on page 1042)
- Adding Currency Prompts in Analytics (on page 1044)
- Adding Image Prompts in Analytics (on page 1044)
- Adding Variable Prompts in Analytics (on page 1045)

Adding Column Prompts in Analytics

A column prompt allows users to select values to filter a column in an analysis. You can define the range of possible filter values and how the user selects the filter values for the analysis.

You define column prompts in the Prompts tab. When you have multiple column filter prompts constructed for an analysis, they are presented to the user one at a time, in the order they are listed, from top to bottom, or from left to right if you select the New Column check box for the prompts.

You can create multiple column prompts for an analysis, but you can create only one column prompt for any given column in the analysis.

You can also use a column prompt to populate a variable of either of the following types:

- **Presentation Variable.** A presentation variable can be used in a formula or a filter.
- **Request Variable.** A request variable can be used to override the value of a session variable for the duration of a request initiated from the prompt. If you specify that the column prompt is to populate a request variable, then the value that the user selects in the column prompt overrides the value of the session variable from the time the user presses the Go button for the prompt until the analysis results are returned.

To add a column prompt

1. In the Prompts tab of the analysis editor, click the New icon, then select Column Prompt, and then select the column you want.
2. In the New Prompt dialog box:
   a. (Optional) To create a custom label, select the Custom Label check box and in the Label field, replace the existing column name with your new custom label.

      If you do not create a custom label, then the name of the column appears as the label.
   b. (Optional) Enter a description in the Description text box.
   c. In the Operator drop-down menu, choose a comparison operator, such as equal to, is greater than, or begins with.
   d. In the User Input drop-down menu, choose a method for the user to select a value to filter by. The choices include:
      - Text Field (for direct entry of a filter value)
      - Choice List (the application displays a drop-down menu with all possible values and the user must choose one value)
      - Slider (the application displays a slider (with your specified minimum and maximum values) and the user must adjust the slider.)
      - Check Boxes (the user can select one or more than one value.)
      - Radio Buttons (the user must select only one value)
      - List Box (similar to Choice List, but the choices are displayed in a list box instead of a drop-down menu)

      Some choices for User Input require further specification in the Options section of the dialog box.
   e. In the Options section of the dialog box, specify the options for the column prompt.

      The options vary depending on what you selected in the User Input field.

      NOTE: If you selected either the Choice List, Check Boxes, Radio Buttons, or List Box user input type, then you can constrain the values of the prompt by values of other prompts, by selecting the appropriate option in the Limit values by field in the Options section of the dialog box.
   f. If you want the column prompt to populate a variable, then do one of the following:
      - In the Set a variable field, select Presentation Variable and then enter a name for the variable.
      - In the Set a variable field, select Request Variable and then enter the name for the variable. The name must be exactly the same as the name of the session variable whose value you want to override.
   g. When you are finished, click OK.

      The column filter prompt is shown on the Display pane.
3. Save the analysis.

Adding Currency Prompts in Analytics

A currency prompt allows users to change the currency type in an analysis that contains a currency column. The list of currencies that users can select includes all of the currencies that are active for your company.

To add a currency prompt

1. In the Prompts tab of the analysis editor, click the New icon, and then select Currency Prompt.
2. In the New Prompt dialog box, enter a label for the prompt, and optionally enter a description of the prompt.
3. Select the option that you want for the picklist width.
4. Click OK.
5. Save the analysis.

Adding Image Prompts in Analytics

An image prompt provides an image that users click to select their analysis criteria. For example, from an image that shows products, users can click a product. The selected product is then used to filter the underlying analysis. To create an image prompt, you need to know how to use the HTML <map> tag to create an image map definition.

You define image prompts in the Prompts tab. When you have created multiple image prompts for an analysis, they are executed in the order in which they are listed; that is, from top to bottom.

To add or modify an image prompt

1. In the Prompts tab, click the New icon, and choose Image Prompt.
2. In the Image Map Prompt Properties dialog box, enter a caption for the image prompt in the Caption box.

   The caption appears when a user runs the analysis. You can include HTML markup tags in the caption, such as <b>, <center>, <font>, and <table>.
3. Enter a description in the Description text box (optional).
4. Enter the location and name of the image in the Image URL field.

   If the image prompt is for your use only, you can specify a location that only you can access, such as c:\mycomputer\temp\map.gif. For an image prompt that will be available to other users, specify the Universal Naming Convention (UNC) name, such as \\ALLUSERS\graphics\map.gif, or a Web site accessible to all your users, such as http://mycompany.com/imagemap.gif.
5. Enter the appropriate HTML <map> tags and data in the HTML text box.

   An HTML <map> statement with <area> elements is required. Each <area> element must specify shape= and coords= attributes. The alt= attribute, if specified, will be mapped to the Area title. For example:

   ```
   <map>
   <area alt="Top-left" shape="rect" coords="0,0,50,50">
   <area alt="Top-right" shape="rect" coords="50,0,100,50">
   <area alt="Bottom" shape="rect" coords="0,50,100,100">
   </map>
   ```
6. To extract the image map information from the HTML, click the link Extract Image Map from HTML.

   The Image Map Prompt Properties dialog box expands to show the area titles, shapes, and coordinates entered in the HTML text box.

   - You can change the values in the area title if you want. This text appears when a user moves the pointer over the image area.

- For each area, in the Column text box, enter the name of the column to pass when a user clicks it, and the value to use.

  NOTE: The column needs to be a fully qualified column name, in the format *Table.Column Name*.

- Place double quotes around any column names containing spaces. For example:
  - Account."Account Country"
  - "Units shipped"

7 When you are finished, click OK.

The image prompt is shown on the Display pane.

8 To view the image prompt, click the Preview button.

When you click an area of the image, the underlying filter constructed for that area displays. You can click the Refresh link to see the results. You can change the filter criteria and then click the Refresh link again to see the change reflected in the results.

To modify the properties of an image prompt

1 Click the Properties icon for the prompt.
2 In the Image Map Prompt Properties dialog box, make your changes to the Caption, Description, and Image URL.
3 To modify the image map, click the Change Image Map link at the bottom of the dialog box.
4 When done, click OK.

Adding Variable Prompts in Analytics

A variable prompt allows users to select a value from a set of values that you specify in the prompt. There are two types of variable prompts:

- **Presentation Variable.** A presentation variable prompt can be used in a formula or a filter.
- **Request Variable.** A request variable prompt can be used to override the value of a session variable for the duration of a request initiated from the prompt. If a request variable that has the same name as a system variable exists in an analysis, then the value of the system variable is overridden by the value that the user selects in the request variable prompt. However, the selected value of the request variable is in effect only from the time the user presses the Go button for the prompt until the analysis results are returned.

  NOTE: Certain system session variables cannot be overridden.

A variable prompt is not dependent upon a column, but can use a column. The set of values in a variable prompt can be one of the following:

- Custom values
- All values from a column
- Specific values from a column
- Values in a saved group
- Values returned by an SQL statement that you specify

As an example of a variable prompt that uses custom values, you might want to allow users to see the revenue values after applying various levels of discount. To do this, you can create a presentation variable prompt and specify the values as 10, 15, and 20 percent. Then you create a new column in the analysis and enter the formula Revenue multiplied by the variable that you specified.

As an example of a variable prompt that uses values from column, you might create a presentation variable prompt that uses the values of the Sales Stage column, and then create a filter in the analysis that uses the variable to filter on the selected sales stage. A variable prompt that uses the values of a column acts in the same way as a column prompt. However, variable prompts have the advantage that you can create multiple variable prompts using the values of the same column, whereas you can create only one column prompt for a given column.

To add a variable prompt

1. In the Prompts tab of the analysis editor, click the New icon, and then select Variable Prompt.
2. In the New Prompt dialog box:
   a. In the Prompt for field, do one of the following:
      - Select Presentation Variable and then enter a name for the variable.
      - Select Request Variable and then enter the name for the variable. The name must be exactly the same as the name of the session variable whose value you want to override.
   b. Enter an appropriate label for the prompt, and optionally enter a description.
      The label appears beside the prompt field at runtime.
   c. In the User Input drop-down menu, choose a method for the user to select a value to filter by.
   d. If you selected either the Choice List, Check Boxes, Radio Buttons, or List Box user input type, then specify or select the values for the variable.
   e. In the Options section of the dialog box, specify the options for the variable prompt.
      The options vary depending on what you selected in the User Input field.
   f. When you finish defining the prompt, click OK to close the dialog box.
3. Save the analysis.

Step 4: Saving Analyses

When you finish defining the criteria, layout, and optional prompts for your analysis, you save it.

To finish your analysis and save it

1. In the Criteria, Results, or Prompts tab, click the Save or Save As icon at the right side of the icon bar.
2. Select the folder where you want to save the analysis.

   Note: If your user role has the Manage Custom Reports privilege you can create, edit, and save reports in all folders.

3. Enter a name for your analysis.

   TIP: Use a consistent naming convention that all users will recognize. Also, avoid using extra blank spaces or symbols, such as apostrophes, when naming analyses.

4. Enter a short description of the analysis.

   TIP: Use the description to let users know if the analysis contains historical or real-time data.

5. Click OK.

Making Custom Analyses Public

Before making a report available to all employees, verify its content and format by running a test and getting approval by the person who requested the report. The reviewer should check for the following:

- Report includes all necessary columns.
- Columns are sorted correctly.
- Filters are limiting the data correctly.

- Graphs present the data in a useful way.

You can release the reports you created so that all employees at your company can use them. Those reports appear in the Shared Custom Analyses section on their Reports Homepage.

Note: The Reports Homepage has a limit of 100 custom reports.

To make your report public

1. In Oracle CRM On Demand, click the Analytics tab.
2. On the Home page, click Catalog and then locate your analyis.
3. Open the analysis.
4. Click Save.
5. Select the folder where you want to save the report.
6. Click OK to save the report.

   Making a report public releases the report so that other employees at your company who have visibility to the folder, where you saved it, can access the report. Your private report in My Folders is still saved in case you want to run it or revise it for dynamic analysis later.

Viewing SQL Code in the Advanced Tab in Analytics

The Advanced tab in the analysis editor shows the SQL code that is submitted to the Oracle BI server when the analysis is executed. Viewing the SQL code can help you to troubleshoot possible issues in an analysis. The Advanced tab is available only if your user role has one of the following privileges:

- Manage Custom Reports
- Manage Personal Reports

If your user role has the Cross-Subject Areas Analytics privilege, then you can also use the Advanced tab to enable the dimensionality variable in the SQL code for an analysis that combines two or more subject areas. The dimensionality variable enables the query to return the total value for all of the selected measures in the dimensions. For more information about combining multiple subject areas in an analysis, see Combining Multiple Subject Areas in a Single Analysis (on page 996).

Using Functions in Analytics

SQL functions perform various calculations on column values. This section explains the syntax for the functions supported by Oracle CRM On Demand. It also explains how to express literals. There are aggregate, string, math, calendar date/time, conversion, and system functions.

You can use functions anywhere that formulas or SQL expressions are allowed. For example:

- **Column formulas.** For more information, see Setting Up Column Formulas (on page 992).
- **Filter formulas.** For more information, see Adding Filters to Columns in Analytics (on page 976).
- **Bins.** For more information, see Adding Filters to Columns in Analytics (on page 976).

Formula Names

When referring to a column in a function, you must use its internal formula name. All columns have two different names:

- The *display name* of the column is the name that you see displayed in the Active Subject Area section on the left side of the page, under a specific folder name. These names are used as the default labels for column headings. The names change depending on the language setting of the user, as well as any field name changes made by your company's Oracle CRM On Demand administrator.

- The *formula name* is a fixed, internal name for each column. These names are always in English. Formula names contain two parts that are separated by a period. The first part corresponds to the folder name, and the second part corresponds to the column. If there are any spaces in either the folder name or the column name, then that part must be enclosed in double quotes. The folder name part of the formula name is often the same as the displayed folder name, but not always.

The following table provides examples of formula names that correspond to specific folder and display names for a column.

Folder Name	Display Name	Formula Name
Account	Main Phone #	Account."Phone Number"
Account	Annual Revenues	Account."Annual Revenue"
Date Created	Fiscal Qtr/Yr	"Date Created"."Fiscal Quarter/Yr"
Owned By User	User ID	Employee."Employee ID"

Finding the Formula Name

To determine the formula name for a column, first add the column to a report. Click Edit Formula [fx], and then the Column Formula tab in the resulting dialog box. The formula name for that column can be found in the Column Formula text box.

TIP: When the cursor is in the Column Formula dialog box, clicking a column in the Action bar inserts the column's formula name directly into the text box at the cursor location (but the column is not added to the list of columns for the report). This shortcut works only for the Column Formula dialog box, not for other dialog boxes where SQL can be entered.

For more information, see the following topics:

- Expressing Literals (on page 1048)
- Aggregate Functions (on page 1049)
- String Functions (on page 1058)
- Math Functions (on page 1064)
- Calendar Date/Time Functions (on page 1069)
- Conversion Functions (on page 1075)
- System Functions (on page 1076)

Expressing Literals

A literal is a nonnull value corresponding to a given data type. Literals are typically constant values; that is, they are values that are taken literally *as is*, without changing them at all. A literal value has to comply with the data type it represents.

This section describes how to express each type of literal.

Character Literals

A character literal contains characters such as letters, numbers and symbols. To express a character literal, surround the character string with single quotes ('). The length of the literal is determined by the number of characters between the single quotes.

Datetime Literals

The SQL 92 standard defines three kinds of typed datetime literals, in the following formats:

DATE 'yyyy-MM-dd'

TIME 'hh:MM:ss'

TIMESTAMP 'yyyy-MM-dd hh:mm:ss'

These formats are fixed. To express a typed datetime literal, use the keywords DATE, TIME, or TIMESTAMP followed by a datetime string enclosed in single quote marks. Two digits are required for all non-year components even if the value is a single digit.

Example:

```
CASE

WHEN Opportunity."Close Date" >= TIMESTAMP '2006-01-01 00:00:00' THEN '2006'

ELSE 'Pre-2006'

END
```

Numeric Literals

A numeric literal represents a value of a numeric data type. To express a numeric literal, simply include the number.

Do not surround numeric literals with single quotes; doing so expresses the literal as a character literal.

A number can be preceded with either a plus sign (+) or minus sign (-) to indicate a positive or negative number, respectively. Numbers can contain a decimal point and decimal numbers.

To express floating point numbers as literal constants, enter a number followed by the letter *E* (either uppercase or lowercase) and followed by the plus sign (+) or the minus sign (-) to indicate a positive or negative exponent. No spaces are allowed between the integer, the letter *E*, and the sign of the exponent.

Examples:

```
52

2.98

-326

12.5E6
```

Aggregate Functions

Aggregate functions perform work on multiple values to create summary results. The aggregate functions cannot be used to form a nested aggregation in expressions on columns that have a default aggregation rule predefined by Oracle CRM On Demand.

Avg

Calculates the average (mean) value of an expression in a result set. Has to take a numeric expression as its argument.

Syntax:

```
AVG (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

AvgDistinct

Calculates the average (mean) of all distinct values of an expression. Has to take a numeric expression as its argument.

Syntax:

```
AVG (DISTINCT n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

BottomN

Ranks the lowest n values of the expression argument from 1 to n, 1 corresponding to the lowest numerical value. The BOTTOMN function operates on the values returned in the result set.

Syntax:

```
BOTTOMN (n_expression, n)
```

where:

n_expression	Any expression that evaluates to a numerical value.
n	Any positive integer. Represents the bottom number of rankings displayed in the result set, 1 being the lowest rank.

NOTE: A query can contain only one BOTTOMN expression.

Count

Calculates the number of rows having a nonnull value for the expression. The expression is typically a column name, in which case the number of rows with nonnull values for that column is returned.

Syntax:

```
COUNT (expression)
```

where:

expression	Any expression.

CountDistinct

Adds distinct processing to the COUNT function.

Syntax:

```
COUNT (DISTINCT expression)
```

where:

expression	Any expression.

Count (*) (CountStar)

Counts the number of rows.

Syntax:

```
COUNT(*)
```

For example, if a table named Facts contained 200,000,000 rows, the following query would return the following results:

```
SELECT COUNT(*) FROM Facts
```

```
COUNT(*)
```

```
200000000
```

Mavg

Calculates a moving average (mean) for the last n rows of data, inclusive of the current row.

The average for the first row is equal to the numeric expression for the first row, the average for the second row is calculated by taking the average of the first two rows of data, the average for the third row is calculated by taking the average of the first three rows of data, and so on. When the nth row is reached, the average is calculated based on the last n rows of data.

Syntax:

```
MAVG (numExpr, integer)
```

where:

numExpr	Any expression that evaluates to a numerical value.
integer	Any positive integer. Represents the average of the last n rows of data.

Max

Calculates the maximum value (highest numeric value) of the rows satisfying the numeric expression argument.

Syntax:

```
MAX (expression)
```

where:

expression	Any expression.

Median

Calculates the median (middle) value of the rows satisfying the numeric expression argument. When there are an even number of rows, the median is the mean of the two middle rows. This function always returns a double.

Syntax:

```
MEDIAN (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Min

Calculates the minimum value (lowest numeric value) of the rows satisfying the numeric expression argument.

Syntax:

```
MIN (expression)
```

where:

expression	Any expression.

NTile

The NTILE function determines the rank of a value in terms of a user-specified range. It returns integers to represent any range of ranks. In other words, the resulting sorted data set is broken into a number of tiles where there are roughly an equal number of values in each tile.

Syntax:

```
NTILE (n_expression, n)
```

where:

n_expression	Any expression that evaluates to a numerical value.
n	A positive, nonnull integer that represents the number of tiles.

If the n_expression argument is not NULL, the function returns an integer that represents a rank within the reported range.

NTile with n=100 returns what is commonly called the *percentile* (with numbers ranging from 1 to 100, with 100 representing the high end of the sort). This value is different from the results of the Oracle BI Server percentile function, which conforms to what is called *percent rank* in SQL 92 and returns values from 0 to 1.

Percentile

Calculates a percent rank for each value satisfying the numeric expression argument. The percent rank ranges are from 0 (1st percentile) to 1 (100th percentile), inclusive.

The PERCENTILE function calculates the percentile based on the values in the result set of the query.

Syntax:

```
PERCENTILE (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Rank

Calculates the rank for each value satisfying the numeric expression argument. The highest number is assigned a rank of 1, and each successive rank is assigned the next consecutive integer (2, 3, 4,...). If certain values are equal, they are assigned the same rank (for example, 1, 1, 1, 4, 5, 5, 7...).

The RANK function calculates the rank based on the values in the result set of the query.

Syntax:

```
RANK (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

StdDev

The STDDEV function returns the standard deviation for a set of values. The return type is always a double.

Syntax:

```
STDDEV([ALL | DISTINCT] n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

- If ALL is specified, the standard deviation is calculated for all data in the set.
- If DISTINCT is specified, all duplicates are ignored in the calculation.
- If nothing is specified (the default), all data is considered.

There are two other functions that are related to STDDEV:

STDDEV_POP([ALL | DISTINCT] n_expression)

STDDEV_SAMP([ALL | DISTINCT] n_expression)

STDDEV and STDDEV_SAMP are synonyms.

StdDev_Pop

Returns the standard deviation for a set of values using the computational formula for population variance and standard deviation.

Syntax:

```
StdDev_Pop([ALL | DISTINCT] numExpr)
```

where:

numExpr	Any expression that evaluates to a numerical value.

- If ALL is specified, the standard deviation is calculated for all data in the set.
- If DISTINCT is specified, all duplicates are ignored in the calculation.

Sum

Calculates the sum obtained by adding up all values satisfying the numeric expression argument.

Syntax:

```
SUM (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

SumDistinct

Calculates the sum obtained by adding all of the distinct values satisfying the numeric expression argument.

Syntax:

```
SUM(DISTINCT n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

TopN

Ranks the highest n values of the expression argument from 1 to n, 1 corresponding to the highest numerical value.

The TOPN function operates on the values returned in the result set.

Syntax:

```
TOPN (n_expression, n)
```

where:

n_expression	Any expression that evaluates to a numerical value.
n	Any positive integer. Represents the top number of rankings displayed in the result set, 1 being the highest rank.

A query can contain only one TOPN expression.

Running Aggregate Functions

Running aggregate functions are similar to functional aggregates in that they take a set of records as input, but instead of outputting the single aggregate for the entire set of records, they output the aggregate based on records encountered so far.

This section describes the running aggregate functions supported by the Oracle BI Server.

MAVG

Calculates a moving average (mean) for the last n rows of data in the result set, inclusive of the current row.

Syntax:

```
MAVG (n_expression, n)
```

where:

n_expression	Any expression that evaluates to a numerical value.
n	Any positive integer. Represents the average of the last n rows of data.

The average for the first row is equal to the numeric expression for the first row. The average for the second row is calculated by taking the average of the first two rows of data. The average for the third row is calculated by taking the average of the first three rows of data, and so on until you reach the nth row, where the average is calculated based on the last n rows of data.

MSUM

This function calculates a moving sum for the last n rows of data, inclusive of the current row.

The sum for the first row is equal to the numeric expression for the first row. The sum for the second row is calculated by taking the sum of the first two rows of data. The sum for the third row is calculated by taking the sum of the first three rows of data, and so on. When the nth row is reached, the sum is calculated based on the last n rows of data.

Syntax:

```
MSUM (n_expression, n)
```

Where:

n_expression	Any expression that evaluates to a numerical value.
n	Any positive integer. Represents the sum of the last n rows of data.

Example:

The following example shows a report that uses the MSUM function.

MONTH	REVENUE	3_MO_SUM
JAN	100.00	100.00
FEB	200.00	300.00
MAR	100.00	400.00
APRIL	100.00	400.00
MAY	300.00	500.00
JUNE	400.00	800.00
JULY	500.00	1200.00
AUG	500.00	1400.00
SEPT	500.00	1500.00
OCT	300.00	1300.00
NOV	200.00	1000.00
DEC	100.00	600.00

RSUM

This function calculates a running sum based on records encountered so far. The sum for the first row is equal to the numeric expression for the first row. The sum for the second row is calculated by taking the sum of the first two rows of data. The sum for the third row is calculated by taking the sum of the first three rows of data, and so on.

Syntax:

```
RSUM (n_expression)
```

Where:

n_expression	Any expression that evaluates to a numerical value.

Example:

The following example shows a report that uses the RSUM function.

MONTH	REVENUE	RUNNING_SUM
JAN	100.00	100.00
FEB	200.00	300.00

MAR	100.00	400.00
APRIL	100.00	500.00
MAY	300.00	800.00
JUNE	400.00	1200.00
JULY	500.00	1700.00
AUG	500.00	2200.00
SEPT	500.00	2700.00
OCT	300.00	3000.00
NOV	200.00	3200.00
DEC	100.00	3300.00

RCOUNT

This function takes a set of records as input and counts the number of records encountered so far. It resets its value for each group in the query. If a sort order is defined on any column, then this function does not get incremented for adjoining identical values for the sorted column. To avoid this issue, reports should either not contain a sort order on any column or contain sort orders on all columns.

Syntax:

`RCOUNT (Expr)`

Where:

Expr	An expression of any data type.

Example:

The following example shows a report that uses the RCOUNT function.

MONTH	PROFIT	RCOUNT
MAY	300.00	2
JUNE	400.00	3
JULY	500.00	4
AUG	500.00	5
SEPT	500.00	6
OCT	300.00	7

RMAX

This function takes a set of records as input and shows the maximum value based on records encountered so far. The specified data type must be one that can be ordered.

Syntax:

`RMAX (expression)`

Where:

expression	An expression of any data type. The data type must be one that has an associated sort order.

Example:

The following example shows a report that uses the RMAX function.

MONTH	PROFIT	RMAX
JAN	100.00	100.00
FEB	200.00	200.00
MAR	100.00	200.00
APRIL	100.00	200.00
MAY	300.00	300.00
JUNE	400.00	400.00
JULY	500.00	500.00
AUG	500.00	500.00
SEPT	500.00	500.00
OCT	300.00	500.00
NOV	200.00	500.00
DEC	100.00	500.00

RMIN

This function takes a set of records as input and shows the minimum value based on records encountered so far. The specified data type must be one that can be ordered.

Syntax:

`RMIN (expression)`

Where:

expression	An expression of any data type. The data type must be one that has an associated sort order.

Example:

The following example shows a report that uses the RMIN function.

MONTH	PROFIT	RMIN
JAN	400.00	400.00
FEB	200.00	200.00
MAR	100.00	100.00
APRIL	100.00	100.00
MAY	300.00	100.00
JUNE	400.00	100.00
JULY	500.00	100.00
AUG	500.00	100.00
SEPT	500.00	100.00
OCT	300.00	100.00
NOV	200.00	100.00
DEC	100.00	100.00

String Functions

String functions perform various character manipulations, and they operate on character strings.

ASCII

Converts a single character string to its corresponding ASCII code, between 0 and 255.

Syntax:

```
ASCII (character_expression)
```

where:

character_expression	Any expression that evaluates to an ASCII character.

If the character expression evaluates to more than one character, the ASCII code corresponding to the first character in the expression is returned.

BIT_LENGTH

Returns the length, in bits, of a specified string. Each Unicode character is 2 bytes in length, which is equal to 16 bits.

Syntax:

```
BIT_LENGTH (character_expression)
```

where:

character_expression	Any expression that evaluates to character string.

CHAR

Converts a numerical value between 0 and 255 to the character value corresponding to the ASCII code.

Syntax:

```
CHAR (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value between 0 and 255.

CHAR_LENGTH

Returns the length, in number of characters, of a specified string. Leading and trailing blanks are not counted in the length of the string.

Syntax:

```
CHAR_LENGTH (character_expression)
```

where:

character_expression	Any expression that evaluates to a numerical value between 0 and 255.

CONCAT

There are two forms of this function. The first form concatenates two character strings. The second form uses the character string concatenation character to concatenate more than two character strings.

Form 1 Syntax:

```
CONCAT (character_expression1, character_expression2)
```

where:

character_expression	Expressions that evaluate to character strings.

Form 2 Syntax:

```
string_expression1 || string_expression2 || ... string_expressionxx
```

where:

string_expression	Expressions that evaluate to character strings, separated by the character string concatenation operator || (double vertical bars). The first string is concatenated with the second string to produce an intermediate string, which is then concatenated with the next string, and so on.

Example:

```
Account."Account Name" ||'-'|| Account."Account Location"
```

Results look like:

```
Action Rentals - Headquarters
```

INSERT

Inserts a specified character string into a specified location in another character string, replacing a specified number of characters in the target string.

Syntax:

```
INSERT (character_expression1, n, m, character_expression2)
```

where:

character_expression1	Any expression that evaluates to a character string. This is the string receiving the insertion.
character_expression2	Any expression that evaluates to a character string. This is the string to insert.
n	Any positive integer representing the number of characters from the start of the first string where a portion of the second string is inserted.
m	Any positive integer representing the number of characters in the first string to be replaced by the entirety of the second string.

LEFT

Returns a specified number of characters from the left of a string.

Syntax:

```
LEFT (character_expression, n)
```

where:

character_expression	Any expression that evaluates to a character string.
n	Any positive integer representing the number of characters from the left of the string that are returned.

LENGTH

Returns the length, in number of characters, of a specified string. The length is returned excluding any trailing blank characters.

Syntax:

```
LENGTH (character_expression)
```

where:

character_expression	Any expression that evaluates to a character string.

LOCATE

Returns the numerical position of one string within another string. If the string is not found, the LOCATE function returns a value of 0. If you want to specify a starting position to begin the search, use the LOCATEN function instead.

Syntax:

```
LOCATE (character_expression1, character_expression2)
```

where:

character_expression1	Any expression that evaluates to a character string. This is the expression to search for in the character expression.
character_expression2	Any expression that evaluates to a character string. This is the expression to be searched.

LOCATEN

Returns the numerical position of one string within another string. This is identical to the LOCATE function, except that the search begins at the position specified by an integer argument. If the string is not found, the LOCATEN function returns a value of 0. The numerical position to return is determined by counting the first character in the string as occupying position 1, regardless of the value of the integer argument.

Syntax:

```
LOCATEN (character_expression1, character_expression2, n)
```

where:

character_expression1	Any expression that evaluates to a character string. This is the string to search for.
character_expression2	Any expression that evaluates to a character string. This is the string to be searched.
n	Any positive, nonzero integer that represents the starting position to begin to look for the locate expression.

LOWER

Converts a character string to lower case.

Syntax:

```
LOWER (character_expression)
```

where:

character_expression	Any expression that evaluates to a character string.

OCTET_LENGTH

Returns the bits, in base 8 units (number of bytes), of a specified string.

Syntax:

```
OCTET_LENGTH (character_expression)
```

where:

character_expression	Any expression that evaluates to a character string.

POSITION

Returns the numerical position of one string within another string. If the string is not found, the function returns 0.

Syntax:

```
POSITION (character_expression1 IN character_expression2)
```

where:

character_expression1	Any expression that evaluates to a character string. This is the string to search for.
character_expression2	Any expression that evaluates to a character string. This is the string in which to search.

REPEAT

Repeats a specified expression n times, where n is a positive integer.

Syntax:

```
REPEAT (character_expression, n)
```

REPLACE

Replaces specified characters in a string with other specified characters.

Syntax:

```
REPLACE (character_expression, change_expression, replace_with_expression)
```

where:

character_expression	Any expression that evaluates to a character string. This string will have its characters replaced.
change_expression	Any expression that evaluates to a character string. Specifies the characters in the first string that will be replaced.
replace_with_expression	Any expression that evaluates to a character string. Specifies the replacement characters to substitute into the first string.

RIGHT

Returns a specified number of characters from the right of a string.

Syntax:

```
RIGHT (character_expression, n)
```

where:

character_expression	Any expression that evaluates to a character string.
n	Any positive integer representing the number of characters from the right of the first string that are returned.

SPACE

Inserts blank spaces.

Syntax:

`SPACE (integer)`

where:

integer	Any expression that evaluates to a character string.

SUBSTRING

Creates a new string starting from a fixed number of characters into the original string.

Syntax:

`SUBSTRING (character_expression FROM starting_position)`

where:

character_expression	Any expression that evaluates to a character string.
starting_position	A positive integer that indicates the starting position within the first character string.

Example:

`SUBSTRING ('ABCDEF' FROM 3)`

Results in:

`CDEF`

TRIM

Strips specified leading and/or trailing characters from a character string.

Syntax:

`TRIM (type 'character' FROM character_expression)`

where:

type	`LEADING`	Strips specified leading characters from a character string.
	`TRAILING`	Strips specified trailing characters from a character string.
	`BOTH`	Strips specified characters, both leading and trailing, from a character string.
character		Any single character. If the character part of the specification and the single quotes are omitted, a space character is used as a default.
character_expression		Any expression that evaluates to a character string.

NOTE: The syntax `TRIM (character_expression)` is also valid. This trims all leading and trailing spaces.

UPPER

Converts a character string to uppercase.

Syntax:

`UPPER (character_expression)`

where:

character_expression	Any expression that evaluates to a character string.

Math Functions

The math functions perform mathematical operations.

Abs

Calculates the absolute value of a numerical expression.

Syntax:

```
ABS (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Acos

Calculates the arc cosine of a numerical expression.

Syntax:

```
ACOS (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Asin

Calculates the arc sine of a numerical expression.

Syntax:

```
ASIN (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Atan

Calculates the arc tangent of a numerical expression.

Syntax:

```
ATAN (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Atan2

Calculates the arc tangent of y/x, where y is the first numerical expression and x is the second numerical expression.

Syntax:

```
ATAN2 (n_expression1, n_expression2)
```

where:

n_expression (1 and 2)	Any expression that evaluates to a numerical value.

Ceiling

Rounds a noninteger numerical expression to the next highest integer. If the numerical expression evaluates to an integer, the Ceiling function returns that integer.

Syntax:

```
CEILING (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Cos

Calculates the cosine of a numerical expression.

Syntax:

```
COS (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Cot

Calculates the cotangent of a numerical expression.

Syntax:

```
COT (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Degrees

Converts an expression from radians to degrees.

Syntax:

```
DEGREES (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Exp

Calculates the value e to the power specified.

Syntax:

```
EXP (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Floor

Rounds a noninteger numerical expression to the next lowest integer. If the numerical expression evaluates to an integer, the FLOOR function returns that integer.

Syntax:

```
FLOOR (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Log

Calculates the natural logarithm of an expression.

Syntax:

```
LOG (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Log10

Calculates the base 10 logarithm of an expression.

Syntax:

```
LOG10 (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Mod

Divides the first numerical expression by the second numerical expression and returns the remainder portion of the quotient.

Syntax:

```
MOD (n_expression1, n_expression2)
```

where:

n_expression (1 and 2)	Any expression that evaluates to a numerical value.

Pi

Returns the constant value of pi (the circumference of a circle divided by the diameter of a circle).

Syntax:

```
PI()
```

Power

Takes the first numerical expression and raises it to the power specified in the second numerical expression.

Syntax:

```
POWER(n_expression1, n_expression2)
```

where:

n_expression (1 and 2)	Any expression that evaluates to a numerical value.

Radians

Converts an expression from degrees to radians.

Syntax:

```
RADIANS (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Rand

Returns a pseudo-random number between 0 and 1.

Syntax:

```
RAND()
```

RandFromSeed

Returns a pseudo-random number based on a seed value. For a given seed value, the same set of random numbers are generated.

Syntax:

```
RAND (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Round

Rounds a numerical expression to n digits of precision.

Syntax:

```
ROUND (n_expression, n)
```

where:

n_expression	Any expression that evaluates to a numerical value.
n	Any positive integer representing the number of digits of precision (that is, the number of decimal places) to which to round.

Example:

```
ROUND (12.358,2)
```

Returns:

```
12.36
```

Sign

Returns a value of 1 if the numerical expression argument evaluates to a positive number, a value of -1 if the numerical expression argument evaluates to a negative number, and 0 if the numerical expression argument evaluates to zero.

Syntax:

```
SIGN (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Sin

Calculates the sine of a numerical expression.

Syntax:

```
SIN (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Sqrt

Calculates the square root of the numerical expression argument. The numerical expression has to evaluate to a nonnegative number.

Syntax:

```
SQRT (n_expression)
```

where:

n_expression	Any expression that evaluates to a nonnegative numerical value.

Tan

Calculates the tangent of a numerical expression.

Syntax:

```
TAN (n_expression)
```

where:

n_expression	Any expression that evaluates to a numerical value.

Truncate

Truncates a decimal number to return a specified number of decimal places.

Syntax:

```
TRUNCATE (n_expression, n)
```

where:

n_expression	Any expression that evaluates to a numerical value.

n	Any positive integer representing the number of decimal places that are returned.

Example:

```
TRUNCATE (12.358,2)
```

Returns:

```
12.35
```

Calendar Date/Time Functions

The calendar date/time functions manipulate data in data types for date, time and timestamp. (The timestamp data type is a combination of date and time.)

Current_Date

Returns the current date. The date is determined by the computer. The value does not contain a time component.

Syntax:

```
CURRENT_DATE
```

Current_Time

Returns the current time. The time is determined by the computer The value does not contain a date component.

Note: This function obtains the current time at the time the report is run. Using this function with an analytics subject area prevents the report from caching, which decreases performance.

Syntax:

```
CURRENT_TIME (n)
```

where:

n	Any integer representing the number of digits of precision with which to display the fractional second. The argument is optional; the function returns the default precision when no argument is specified.

Current_TimeStamp

Returns the current date/timestamp. The timestamp is determined by the computer.

Note: This function obtains the current time at the time the report is run. Using this function with an analytics subject area prevents the report from caching, which decreases performance.

Syntax:

```
CURRENT_TIMESTAMP (n)
```

where:

n	Any integer representing the number of digits of precision with which to display the fractional second. The argument is optional; the function returns the default precision when no argument is specified.

Day_Of_Quarter

Returns a number (between 1 and 92) corresponding to the day of the quarter for the specified date.

Syntax:

```
DAY_OF_QUARTER (date_expression)
```

where:

date_expression	Any expression that evaluates to a date.

DayName

Returns the name of the day of the week (in English) for a specified date.

Syntax:

DAYNAME (date_expression)

where:

date_expression	Any expression that evaluates to a date.

DayOfMonth

Returns the number corresponding to the day of the month for a specified date.

Syntax:

```
DAYOFMONTH (date_expression)
```

where:

date_expression	Any expression that evaluates to a date.

DayOfWeek

Returns a number between 1 and 7, corresponding to the day of the week, for a specified date. The number 1 corresponds to Sunday, and the number 7 corresponds to Saturday.

Syntax:

DAYOFWEEK (date_expression)

where:

date_expression	Any expression that evaluates to a date.

DayOfYear

Returns the number (between 1 and 366) corresponding to the day of the year for a specified date.

Syntax:

DAYOFYEAR (date_expression)

where:

date_expression	Any expression that evaluates to a date.

Hour

Returns a number (between 0 and 23) corresponding to the hour for a specified time. For example, 0 corresponds to 12 a.m. and 23 corresponds to 11 p.m.

Syntax:

```
HOUR (time_expression)
```

where:

time_expression	Any expression that evaluates to a time.

Minute

Returns a number (between 0 and 59) corresponding to the minute for a specified time.

Syntax:

```
MINUTE (time_expression)
```

where:

time_expression	Any expression that evaluates to a time.

Month

Returns the number (between 1 and 12) corresponding to the month for a specified date.

Syntax:

```
MONTH (date_expression)
```

where:

date_expression	Any expression that evaluates to a date.

Month_Of_Quarter

Returns the number (between 1 and 3) corresponding to the month in the quarter for a specified date.

Syntax:

```
MONTH_OF_QUARTER (date_expression)
```

where:

date_expression	Any expression that evaluates to a date.

MonthName

Returns the name of the month (in English) for a specified date.

Syntax:

```
MONTHNAME (date_expression)
```

where:

date_expression	Any expression that evaluates to a date.

Now

Returns the current timestamp. The NOW function is equivalent to the CURRENT_TIMESTAMP function.

Note: This function obtains the current time at the time the report is run. Using this function with an analytics subject area prevents the report from caching, which decreases performance.

Syntax:

```
NOW ()
```

Quarter_Of_Year

Returns the number (between 1 and 4) corresponding to the quarter of the year for a specified date.

Syntax:

```
QUARTER_OF_YEAR (date_expression)
```

where:

date_expression	Any expression that evaluates to a date.

Second

Returns the number (between 0 and 59) corresponding to the seconds for a specified time.

Syntax:

```
SECOND (time_expression)
```

where:

time_expression	Any expression that evaluates to a time.

TimestampAdd

The TimestampAdd function adds a specified number of intervals to a specified timestamp. A single timestamp is returned.

Syntax:

```
TimestampAdd (interval, integer_expression, timestamp_expression)
```

where:

interval	The specified interval. Valid values are: SQL_TSI_SECOND SQL_TSI_MINUTE SQL_TSI_HOUR SQL_TSI_DAY SQL_TSI_WEEK SQL_TSI_MONTH SQL_TSI_QUARTER SQL_TSI_YEAR
integer_expression	Any expression that evaluates to an integer. This is the number of intervals to add.
timestamp_expression	The timestamp used as the base in the calculation.

A null integer-expression or a null timestamp-expression passed to this function will result in a null return value.

In the simplest scenario, this function merely adds the specified integer value (integer_expression) to the appropriate component of the timestamp, based on the interval. Adding a week translates to adding seven days, and adding a quarter translates to adding three months. A negative integer value results in a subtraction (going back in time).

An overflow of the specified component (such as more than 60 seconds, 24 hours, twelve months, and so on) necessitates adding an appropriate amount to the next component. For example, when adding to the day component of a timestamp, this function considers overflow and takes into account the number of days in a particular month (including leap years when February has 29 days).

When adding to the month component of a timestamp, this function verifies that the resulting timestamp has a sufficient number of days for the day component. For example, adding 1 month to 2000-05-31 does not result in 2000-06-31 because June does not have 31 days. This function reduces the day component to the last day of the month, 2000-06-30 in this example.

A similar issue arises when adding to the year component of a timestamp having a month component of February and a day component of 29 (that is, last day of February in a leap year). If the resulting timestamp does not fall on a leap year, the function reduces the day component to 28.

The following are examples of the TimestampAdd function:

The following code example asks for the resulting timestamp when 3 days are added to 2000-02-27 14:30:00. Because February, 2000 is a leap year, this returns a single timestamp of 2000-03-01 14:30:00.

```
TimestampAdd(SQL_TSI_DAY, 3, TIMESTAMP‘2000-02-27 14:30:00’)
```

The following code example asks for the resulting timestamp when 7 months are added to 1999-07-31 0:0:0. This returns a single timestamp of 2000-02-29 00:00:00. Notice the reduction of day component to 29 because of the shorter month of February.

```
TimestampAdd(SQL_TSI_MONTH, 7, TIMESTAMP‘1999-07-31 00:00:00’)
```

The following code example asks for the resulting timestamp when 25 minutes are added to 2000-07-31 23:35:00. This returns a single timestamp of 2000-08-01 00:00:00. Notice the propagation of overflow through the month component.

```
TimestampAdd(SQL_TSI_MINUTE, 25, TIMESTAMP‘2000-07-31 23:35:00’)
```

TimeStampDiff

The TimestampDiff function returns the total number of specified intervals between two timestamps.

Syntax:

```
TimestampDiff (interval, timestamp_expression1, timestamp_expression2)
```

where:

interval	The specified interval. Valid values are: SQL_TSI_SECOND SQL_TSI_MINUTE SQL_TSI_HOUR SQL_TSI_DAY SQL_TSI_WEEK SQL_TSI_MONTH SQL_TSI_QUARTER SQL_TSI_YEAR

timestamp_expression1	The timestamp to subtract from the second timestamp.
timestamp_expression2	The second timestamp. timestamp_expression1 is subtracted from this timestamp to determine the difference.

A null timestamp-expression parameter passed to this function will result in a null return value.

This function first determines the timestamp component that corresponds to the specified interval parameter. For example, SQL_TSI_DAY corresponds to the day component and SQL_TSI_MONTH corresponds to the month component.

The function then looks at the higher order components of both timestamps to calculate the total number of intervals for each timestamp. For example, if the specified interval corresponds to the month component, the function calculates the total number of months for each timestamp by adding the month component and twelve times the year component.

Finally, the function subtracts the first timestamp's total number of intervals from the second timestamp's total number of intervals.

When calculating the difference in days, the function truncates the time values from both Timestamp expressions and then subtracts the date values.

When calculating the difference in weeks, the function calculates the difference in days and divides by seven before rounding.

When calculating the difference in quarters, the function calculates the difference in months and divides by three before rounding.

When calculating the difference in years, the function calculates the difference in months and divides by twelve before rounding.

TimestampDiff Function and Results Example

The following code example asks for a difference in days between timestamps 1998-07-31 23:35:00 and 2000-04-01 14:24:00. It returns a value of 610. Notice that the leap year in 2000 results in an additional day.

```
TimestampDIFF(SQL_TSI_DAY, TIMESTAMP‘1998-07-31 23:35:00’, TIMESTAMP‘2000-04-01
14:24:00’)
```

Week_Of_Quarter

Returns a number (between 1 and 13) corresponding to the week of the quarter for the specified date.

Syntax:

```
WEEK_OF_QUARTER (date_expression)
```

where:

date_expression	Any expression that evaluates to a date.

Week_Of_Year

Returns a number (between 1 and 53) corresponding to the week of the year for the specified date.

Syntax:

```
WEEK_OF_YEAR (date_expression)
```

where:

date_expression	Any expression that evaluates to a date.

Year

Returns the year for the specified date.

Syntax:

```
YEAR (date_expression)
```

where:

date_expression	Any expression that evaluates to a date.

Example:

```
YEAR (CURRENT_DATE)
```

Conversion Functions

The conversion functions convert a value from one form to another.

Cast

Changes the data type of either a value or a null value to another data type. This change is required before using values of one data type in a function or operation that expects another data type.

Syntax:

```
CAST (expression|NULL AS datatype)
```

The supported data types to which the value can be changed are the following:

```
CHARACTER, VARCHAR, INTEGER, FLOAT, SMALLINT, DOUBLE PRECISION, DATE, TIME,
TIMESTAMP, BIT, BIT VARYING
```

Depending on the source data type, some destination types are not supported. For example, if the source data type is a BIT string, the destination data type has to be a character string or another BIT string.

Example:

The following first changes (CASTs) Annual Revenues to an INTEGER to remove the decimal places, and then to a CHARACTER so that it can be concatenated with a character literal (the text 'K'):

```
CAST ( CAST ( Account."Account Revenue"/1000 AS INTEGER ) AS CHARACTER ) ||' K'
```

If you use the CAST function, then the CAST function might return an extra space at the end of the value, for example: CAST(YEAR("Date Created".Date) as char) || '*' returns "2012 *"

You can avoid this problem by specifying the length of the return value, for example:

```
CAST(YEAR("Date Created".Date) as char(4))
```

IfNull

Tests if an expression evaluates to a null value, and if it does, assigns the specified value to the expression.

Syntax:

```
IFNULL (expression, value)
```

ValueOf( )

Use the VALUEOF function in an expression builder or filter to reference the value of a session variable. For more information, see Session Variables in Analytics (on page 1079).

Session variables should be used as arguments of the VALUEOF function. Refer to session variables by name.

Example:

To use the value of a session variable named NQ_SESSION.CURRENT_YEAR:

```
CASE WHEN "Year" > VALUEOF(NQ_SESSION.CURRENT_YEAR) THEN 'Future' WHEN ...
ELSE...END
```

You must refer to a session variable by its fully qualified name.

System Functions

The system functions return values relating to the session.

User

Returns the current Oracle CRM On Demand user's information.

If the user was created in Oracle CRM On Demand Release 18 or earlier, the user information is the User ID, which is unique to each user.

If the user was created in Oracle CRM On Demand Release 19 or later, the user information is the user record row ID. To acquire the User ID, use the VALUEOF function and the session variable REPLUSER as follows:

```
VALUEOF(NQ_SESSION.REPLUSER)
```

Syntax:

```
USER ()
```

Operators

Operators are used to combine expression elements to make certain types of comparisons in an expression.

Operator	Function in an Expression
+	Plus sign for addition.
-	Minus sign for subtraction
*	Multiply sign for multiplication
/	Divide by sign for division
||	Character string concatenation
(	Open parenthesis, for grouping operations
)	Close parenthesis, for grouping operations
>	Greater than sign, indicating values higher than the comparison
<	Less than sign, indicating values lower than the comparison
=	Equal sign, indicating the same value

Operator	Function in an Expression
<=	Less than or equal to sign, indicating values the same or lower than the comparison
>=	Greater than or equal to sign, indicating values the same or higher than the comparison
<>	Not equal to, indicating values higher or lower, but not the same
AND	AND connective, indicating intersection with one or more conditions to form a compound condition
OR	OR connective, indicating the union with one or more conditions to form a compound condition
NOT	NOT connective, indicating a condition is not met
,	Comma, used to separate elements in a list

Case Statements

Case statements are building blocks for creating conditional expressions that can produce different results for different column values.

Case (Switch)

This form of the Case statement is also referred to as the CASE (Lookup) form. The value of expression1 is examined, then the WHEN expressions. If expression1 matches any WHEN expression, it assigns the value in the corresponding THEN expression.

If expression1 matches an expression in more than one WHEN clause, only the expression following the first match is assigned.

If none of the WHEN expressions match, it assigns the value specified in the ELSE expression. If no ELSE expression is specified, it assigns the value NULL.

Refer also to the Case (If) statement.

Syntax:

```
CASE expression1

WHEN expression THEN expression

{WHEN expression... THEN expression...}

ELSE expression

END
```

Where:

`CASE`

Starts the CASE statement. Must be followed by an expression and one or more WHEN and THEN statements, an optional ELSE statement, and the END keyword.

`WHEN`

Specifies the condition to be satisfied.

THEN

Specifies the value to assign if the corresponding WHEN expression is satisfied.

ELSE

Specifies the value to assign if none of the WHEN conditions are satisfied. If omitted, ELSE NULL is assumed.

END

Ends the CASE statement.

Example

```
CASE Score-par
WHEN -5 THEN 'Birdie on Par 6'
WHEN -4 THEN 'Must be Tiger'
WHEN -3 THEN 'Three under par'
WHEN -2 THEN 'Two under par'
WHEN -1 THEN 'Birdie'
WHEN 0 THEN 'Par'
WHEN 1 THEN 'Bogey'
WHEN 2 THEN 'Double Bogey'
ELSE 'Triple Bogey or Worse'
END
```

In the above example, the WHEN statements must reflect a strict equality; a WHEN condition of

```
WHEN < 0 THEN 'Under Par'
```

is illegal because comparison operators are not allowed.

Case (If)

This form of the Case statement evaluates each WHEN condition and if satisfied, assigns the value in the corresponding THEN expression.

If none of the WHEN conditions are satisfied, it assigns the default value specified in the ELSE expression. If no ELSE expression is specified, it assigns the value NULL.

Refer also to the Case (Switch) statement.

Syntax:

```
CASE
WHEN request_condition1 THEN expression1
{WHEN request_condition2 THEN expression2}
{WHEN request_condition... THEN expression...}
ELSE expression
END
```

Where:

CASE

Starts the CASE statement. Must be followed by one or more WHEN and THEN statements, an optional ELSE statement, and the END keyword.

`WHEN`

Specifies the condition to be satisfied.

`THEN`

The value to assign if the corresponding WHEN expression is satisfied.

`ELSE`

Specifies the value if none of the WHEN conditions are satisfied. If omitted, ELSE NULL is assumed.

`END`

Ends the CASE statement.

Example

```
CASE
WHEN score-par < 0 THEN 'Under Par'
WHEN score-par = 0 THEN 'Par'
WHEN score-par = 1 THEN 'Bogie'
WHEN score-par = 2 THEN 'Double Bogey'
ELSE 'Triple Bogey or Worse'
END
```

Unlike the Switch form of the CASE statement, the WHEN statements in the If form allow comparison operators; a WHEN condition of

```
WHEN < 0 THEN 'Under Par'
```

is legal.

Session Variables in Analytics

Session variables hold predefined values for a user and are initialized when a user logs in to Oracle CRM On Demand. When session variables are initialized, they remain unchanged for the duration of the session. Session variables are private values for a user and each instance of a session variable can be initialized with a different value for different users. You can reference them in the following areas: Title views, Narrative views, Column Filters, Column Formulas, Dashboard Prompts, and so on.

The most common use of a session variable is to reference it in a column filter condition of a report where you want to dynamically limit the results. The limit is based on the value of a session variable, such as the current fiscal year and month.

A session variable is referenced using the syntax NQ_SESSION.{Variable Name}. To use it in a column formula, it is referenced using the syntax VALUEOF(NQ_SESSION.Variable Name).

Session Variable	Description
CURRENT_DT	Current date and time.
COMPANY_LANG	Company's default language.

COMPANY_TIMEZONE	Company's default time zone.
COMPANY_TMPLT_COUNTRY	Company's default country.
CONTEXT_ID	ID of currently selected custom book or user in the Book selector.
CURRENT_MONTH	Current fiscal month of the session for the user. The values range from 1 to 12.
CURRENT_QTR	Current fiscal quarter of the session for the user. The values range from 1 to 4.
CURRENT_YEAR	Current fiscal year of the session for the user. A four-digit value, for example: 2011.
DISPLAYNAME	Current user's name.
INC_SUBITEM	Currently selected value of Include Sub-Items check box in the Book selector.
LAST_QTR	Previous quarter.
LAST_QTR_YEAR	Year of the previous quarter.
LAST_YEAR	Previous year.
NEXT_QTR	Next quarter.
NEXT_QTR_YEAR	Year of the next quarter.
NEXT_YEAR	Next year.
PREFERRED_CURRENCY	Indicates the currency selection in an Analytics currency prompt.
QAGO	Date (full date prefixed with fiscal calendar definition code) a quarter ago
QTR_BEFORE_LAST	Two quarters ago.
QTR_BEFORE_LAST_YEAR	Year of two quarters ago.
REPLUSER	Current user's login ID.
SERVER_COMPANY_TIMEZONE_OFFSET	The offset (in minutes) between the server timestamp and company default timestamp. The value of this variable is set when you log in. The variable is not updated during your session.

USER_ALIAS	Current user's alias.
USER_BUSINESS_UNIT	Current user's business unit
USER_BUSINESS_UNIT_LEVEL_1	Level 1 business unit in user's business unit hierarchy
USER_BUSINESS_UNIT_LEVEL_2	Level 2 business unit in user's business unit hierarchy
USER_BUSINESS_UNIT_LEVEL_3	Level 3 business unit in user's business unit hierarchy
USER_BUSINESS_UNIT_LEVEL_4	Level 4 business unit in user's business unit hierarchy
USER_COMPANY_CURCY	Company's default currency.
USER_COMPANY_TIMEZONE_OFFSET	The offset (in minutes) between the user timestamp and company default timestamp. The value of this variable is set when you log in. The variable is not updated during your session.
USER_COUNTRY	Current user's country
USER_DEFAULT_CURCY	User's default currency.
USER_DEPARTMENT	Current user's department
USER_DIVISION	Current user's division
USER_FISCAL_CALENDAR	First month of the current user's fiscal year.
USER_ID	Current user's unique system ID
USER_LANG	User's default language.
USER_LAST_REFRESH_DT	The timestamp, in the user’s timezone, of the start of the most recent refresh of the historical data.
USER_MANAGER_ALIAS	Current user's manager alias
USER_REFRESH_COMPLETE_DT	The timestamp, in the user’s timezone, of the end of the most recent refresh of the historical data.
USER_REGION	Current user's region
USER_REPORTS_TO	Current user's manager

USER_ROLE	Current user's role
USER_SERVER_TIMEZONE_OFFSET	The offset (in minutes) between the user timestamp and server timestamp. The value of this variable is set when you log in. It is not updated during your session..
USER_SUBREGION	Current user's subregion
USER_TIMESTAMP	The timestamp of the user based on the timezone the setting defined in the user profile. The value of this variable is set when you log in. The variable is not updated during your session.
USER_TIMEZONE	The timezone description as defined in your user profile. The value of this variable is set when you log in. The variable is not updated during your session.
YAGO	Date (full date prefixed with fiscal calendar definition code) a year ago.
YEAR_MINUS_THREE	Three years ago.
YEAR_MINUS_TWO	Two years ago.
YEAR_PLUS_TWO	Two years from now.

About Report Performance

Report performance is a concern for companies with large volumes of data and users. The larger and more sophisticated your reporting needs become, the more important the report performance is to you. Understanding how Oracle CRM On Demand efficiently compensates and processes data with caching and during different times helps you to build reports with the best performance possible.

This topic describes the in-built caching mechanism enabling fast response time as well as the expected performance during the nightly refresh and when using reporting subject areas instead of analytic subject areas. For more information about report performance, see Optimizing Performance (on page 1083).

About Caching

When reports and queries are run using analytic subject areas, the query results are cached. The query cache allows Oracle CRM On Demand to satisfy subsequent query requests faster without having to go back to the database. This reduction allows a faster, query-response time. In addition to a faster, query-response time, this feature conserves network resources and eliminates costly database processing. Queries do not have to be identical to take advantage of this query caching. Even a subset of a previously run query with a filter condition or the same query with less columns can use the cache generated by a previous query. Data visibility is fully respected with query caching. Because the database is updated during the incremental refresh, the query cache is purged and repopulated when a new set of queries are run subsequently.

Query caching is supported only for reports and queries using analytic subject areas. Real-time reports and queries are not enabled with query cache. However, both real-time and historical reports and queries use a Web server cache. The Web server cache is not the same as the query cache supported by Oracle CRM On Demand. The Web server cache for real-time and historical queries exists for at least for 10 minutes after being created or used, but it is purged after 60 minutes. Some queries might be purged sooner than 60 minutes, depending on the number of requests being run.

Analytic (Historical) Reports Compared to Reporting (Real-Time) Reports

Queries run using analytic (historical) subject areas are comparatively faster than queries run using reporting (real-time) subject areas. The analytic subject areas use a specialized data warehouse that is designed and optimized exclusively for analysis and reporting. However, the real-time subject areas use the database that is optimized to support the transactional activities where a low volume of records are read, written, updated extremely fast. So, when real-time subject areas are used, queries have to compete for database resources that also have to cater to the needs of transaction updates of Oracle CRM On Demand affecting the performance of both Oracle CRM On Demand and real-time queries. Due to the need to support the reporting of most current data, the real-time subject areas are not enabled with query caching, which further reduces query-performance problems even for identical queries.

Use real-time subject areas only when it is critical to get the most up-to-the-minute data, or when the historical subject areas do not meet your reporting needs.

Report Performance During the Nightly Refresh

Real-time report query performance is somewhat affected during the nightly refresh process, because the data that is being retrieved to satisfy the request is also being read by the nightly refresh process to populate the data warehouse that drives the historical subject areas. However, the performance of historical report queries is not affected during the nightly refresh process, because a snapshot of the data warehouse is taken at the start of the nightly refresh, and users are directed to that replicated copy. Upon completion of the nightly refresh, users are redirected to the refreshed data warehouse automatically. This feature is transparent to users.

Optimizing Performance

Every time you access a report or analysis, your data is retrieved from the database, processed by the reporting server and displayed on the page. The more complex the analysis, the more time it can take to query the database to retrieve and present the data. This topic contains guidelines to help you create reports that display as quickly as possible.

Before you begin. Do the following:

- Review the prebuilt reports available in Oracle CRM On Demand. These reports might address most of your reporting needs.
- Take training courses.
- Gather your reporting requirements and have them approved by the stakeholders.
- Check your browser settings to make sure the browser client is properly configured for performance.
- Understand report performance. For more information, see About Report Performance (on page 1082).

About Subject Areas

You can use the two subject area types depending on your reporting and business needs.

The Analytics subject areas should be used whenever possible to build reports. These subject areas are built using a specially constructed data warehouse that is tuned for better query performance queries. The data warehouse used for Analytics subject areas is refreshed daily and reports built using these subject areas display results faster than Reporting subject areas even for large and complex queries.

The Reporting subject areas are built using the same database in which all other user transactions in the application occur, and hence, compete for same resources that your application depends on when data is retrieved for reports.

Guidelines for Using a Reporting Subject Area

If you are using a Reporting subject area, follow these guidelines:

- When possible, use fields from the Address (Extended) folders.
- When possible, minimize the use of the following:
  - Custom picklist fields.
  - Fields from any Owned By User folder. Instead, use the Owner field.
  - Fields from the Primary Contact folder within the Account folder.
  - CAST functions for Date or Date/Time fields.
  - Parent Account, Last Modified By, Created By, and Manager fields.
  - Fields from Date-type folders, such as Date Created and Date Closed folders.

    Although these folders provide a convenient way to group the date attribute to week, month, quarter, or year, using them also makes the query more complex and may affect the report performance. If experiencing performance problems with fields from the date folders, try using the Date or Date/Time fields from the primary record type folder. For example, open the Opportunity subject area, and select the Close Date field in the Opportunities folder instead of a field from the Close Date folder.

Guidelines for Improving Performance

Follow these guidelines to improve performance:

Build Reports Incrementally

Do the following:

- Start small, and test the report as you build it. Begin with a few fields, and test them before adding more columns.
- Test your filters to determine the best sequence to use.

  Different sequences can increase or decrease performance, but only trial-and-error helps you determine this.

Minimize the Use of Record Types That Cross Fields or Columns

Follow these guidelines:

- **Columns**. When you select columns from more than one record type for your analysis, you are adding complexity to the data query. This complexity can affect the speed of displaying results. So, consider this when including cross-record type fields in a report.
- **Column Selectors.** Keep all column selectors within the same record type. Whenever possible, do not use a column selector that crosses to another record type.
- **Prompts.** Try to make all prompts reference fields within the same record type folder.

Use Indexed Fields

Do the following:

- Use indexed field to filter data in real-time reports.

  Indexed fields are optimized so your report results appear more quickly.
- Plan ahead when you set up your data to make sure that the correct data is stored in the indexed fields.

  Following this practice allows you to build reports that use the indexed fields, incorporating them at the best possible places. Oracle CRM On Demand also has a limited number of indexed custom fields. The number varies according to the field type and record type.

Limit the Organizational Hierarchy to Five Levels

The higher a user is in the organizational hierarchy, the more data is returned and the slower the report runs. Therefore, limit the hierarchy to a maximum of five levels.

Use Filters

Using filters restricts the amount of data that is returned when you access an analysis. Filtering can increase the speed of running your report.

- Apply filters as a first step to building a report. If your company has a lot of data do not run the first preview of a report until you first apply filters.
- Filter your driving record type as a priority. For example, when using an Activities subject area, filter Activities.
- Choose the most restrictive filters first, and then, after experimenting, ease restrictions as needed.

However, consider these guidelines when adding filters:

- If a filter references a column with an underlying CASE formula, this filter might adversely affect reporting performance, depending on the formula and the related processing required. When filtering a field with a CASE statement or other formula, experiment to determine how this filtering affects reporting performance.
- Before using a CASE formula, ask yourself these questions:
  - Can this classification be performed in Oracle CRM On Demand using the Workflow feature?
  - Does the classification code appear in other reports? If so, then consider creating a new column and building a workflow to populate it.
- A report that filters a custom Date field can run more quickly than a similar report that filters a custom Date and Time field, because all Date and Time fields involve converting time zones, which affects reporting performance. Therefore, when possible, filter custom Date fields rather than custom Date and Time fields.
- Avoid using an OR clause on different record types or columns (for example, where SR.Type = 'A' OR SR.Priority = 'High' OR Account.Industry = 'Medical'). Instead, try the following:
  - Remove the OR clause, and perform further classification in the pivot table.
  - Break the report in to multiple, smaller reports, and merge the result using the combined analytics.

Follow the Guidelines for Defining Prompts

You can define prompts for your report in the analysis editor. These prompts allow those users who access the finished report to make selections to limit the data in the report. When running a report that uses prompts, a user's experience is affected by the prompt-processing time and by the report-processing time.

If you add prompts to your report, do the following:

- Minimize the number of prompts used for a report.
- Avoid using high-resolution images for Image prompts. It is recommended that you do not use an image on a report that exceeds 100 dots per inch (dpi). For best performance, use images of 50 dpi or lower.
- When defining prompts, under the What Values Should Be Shown to the User menu, choose either None or All Values for the fastest performance. Avoid using the Filter Limited Values option. This option restricts the prompt selections that the report displays. The restriction is based on other filters and prompts that are applied to the report. If a report contains large volumes of data, this option can slow reporting performance.

  When deciding whether to select the None, All Values, or Filter Limited Values option, it is recommended that you strike a balance between the level of reporting performance that you want and the optimal presentation of selectable values to users.

Provide Drilldown Links to Detail Reports

Instead of creating a report that presents a long list of data tables and graphs, do the following:

- Design an initial report to show the summary information or trends, and let the user drill down on the details.
- Build reports for more detailed information by targeting data from the first report. Then, provide drilldown links to the summary report.

The following procedure describes how to link reports to tables.

To link reports to tables

1. Click the Format Column icon to open the Column Properties dialog box.
2. Click the Column Format tab.
3. In the Value Interaction Type drop-down list, choose Navigate.

4 In the Navigate to Another Analysis field, browse for a detailed report that you want to drill down on, and then click OK.

Limit the Number of Set Operations

Advanced features allow you to combine queries. You can then perform set operations, such as unions, intersections, and other joining actions on those queries to build a final report. The greater the number of query results combined, the more processing time is required to run the final report. For fastest processing, limit the number of set operations to no more than three.

Clarify HTML Code and Narratives

When using HTML in connection with SQL, do the following:

- Make sure that the HTML is clear and precise and does not contain any unnecessary tags or superfluous information.
- Make sure the narratives are clear and precise and do not contain unnecessary instructions.

  Precise narratives make the specified formatting more efficient and reduce performance issues.

Remove Columns in Pivot Tables

Pivot tables allow you to show the report in multiple views without writing multiple reports, but they also might affect performance. Whenever possible, remove the columns from the report criteria (in Step 1 – Define Criteria) that are not used in the pivot table itself.

Use Graph Pivoted Results

Whenever possible, for each pivot table that requires a graph, use the Graph Pivoted Results option instead of creating a separate graph view. Multiple graphs in an analysis can require more processing, because Oracle CRM On Demand must create the graphs individually, rather than simultaneously with the pivot table.

Ensure that Reports Are Scalable

Reports might run well in a test before all of your production data has been imported. After all the production data has been imported, the increased data volume adversely affects reporting performance. If you are in the process of implementing Oracle CRM On Demand, allow time to retest and tune reports after all the production data has been imported.

Use Optimized Code and UTC Fields in Filters

Many reporting subject areas include special fields in their dimensions that are optimized to reduce the query time when they are used in filters. Optimized fields end with the words *Code* or *UTC*. For example, the Account dimension has an Account Type field. There is also an Account Type Code field, which is the optimized version of the Account Type field. Both optimized and nonoptimized fields produce the same results in reports, but using the optimized field in the filter generates faster queries. This method is faster than using the nonoptimized field. Using these fields in filter conditions reduces additional table joins and avoids timestamp conversions that are based on your company's time zone.

Note: These optimized fields support language translations for all supported languages, but they do not support record type renaming.

To improve the performance of analyses that use filters on optimized picklist fields, use the Optimized Picklist Fields (Code) values in the filter instead of the values from the Optimized Custom Fields folders, which are dependent on the company language.

Dashboards

A dashboard can display saved analyses, as well as images, text, and links to Web sites and documents. A dashboard consists of one or more pages and subpages, which appear as tabs across the top of the dashboard. Dashboards are sometimes referred to as interactive dashboards.

A personal dashboard, named My Dashboard, is available to each user in Oracle CRM On Demand. My Dashboard initially has no content. If your user role includes the Access V3 Analytics privilege, then you can do the following:

- Access your personal dashboard and add content to it, even if your user role does not allow you to create or edit other dashboards. For more information, see Working with My Dashboard (on page 1093).
- View any custom dashboards to which you have access. For more information, see Viewing Dashboards (on page 1088).

Some prebuilt dashboards are also provided, which you can view if your user role includes the following privileges:

- Access Analytics Dashboards - View Prebuilt Dashboards
- Access Analytics Reports - View Prebuilt Analyses
- Access V3 Analytics

If your user role includes the Manage Dashboards privilege as well as the Access V3 Analytics privilege, then you can use the dashboard builder to create dashboards and save them in any Analytics folder to which you have access.

NOTE: You cannot change the prebuilt dashboards.

For step-by-step instructions for working with Dashboards, see the following topics:

- Viewing Dashboards (on page 1088)
- Customizing Dashboard Pages at Runtime (on page 1089)
- Creating Dashboards (on page 1090)
- Editing Dashboards (on page 1091)
- Working with My Dashboard (on page 1093)
- Creating Dashboard Prompts (on page 1093)
- Adding Prompts to Dashboards (on page 1094)
- Controlling the Appearance of Dashboard Pages (on page 1095)
- Making Content Appear Conditionally on Dashboard Pages (on page 1096)
- Adding Text Links and Image Links to Dashboard Pages (on page 1097)
- Adding Views of Analytics Folders to Dashboard Pages (on page 1098)
- Controlling How Results Display When Users Drill Down in Dashboard Pages (on page 1099)
- Editing the Properties of Dashboard Prompts and Analyses (on page 1099)
- Applying Formatting to Dashboards (on page 1100)
- Changing Print and Export Options for Dashboards (on page 1101)
- Changing Dashboard Properties (on page 1102)
- Renaming Dashboards (on page 1103)

Related Topics

See the following topics for related information:

- Considerations When Editing or Viewing Dashboards (on page 1088)
- Managing Dashboard Visibility in Analytics (on page 1103)

- Prebuilt Dashboards - Customer Dashboard (on page 1104)
- Prebuilt Dashboards - Overview Dashboard (on page 1104)
- Prebuilt Dashboards - Pipeline Dashboard (on page 1105)
- Prebuilt Dashboards - Sales Effectiveness Dashboard (on page 1105)
- Prebuilt Dashboards - Marketing Effectiveness Dashboard (on page 1105)
- Prebuilt Dashboards - Service Dashboard (on page 1106)

Considerations When Editing or Viewing Dashboards

When editing dashboards, note the following considerations:

- When you create or edit a dashboard, you can add any analysis to which you have access to the dashboard.

  Your user role and privileges determine which Analytics folders you can access and whether you can access the prebuilt analyses. For more information about visibility to the folders where the analyses are stored, see Setting Up User Visibility to Shared Analytics Folders (on page 804).
- The following are some best practice tips for adding analyses from the catalog to a dashboard:
  - Move more complex analyses to a page other than the first page.
  - Organize analyses with a similar focus on the same page.
  - Add no more than four analyses to each page.
- If you do not have access to an analysis on a dashboard, then when you edit the dashboard, an exclamation mark (!) is displayed beside the name of the analysis.
- If an analysis was deleted from the catalog after it was added to a dashboard, then when you edit the dashboard, an exclamation mark (!) is displayed beside the name of the analysis.

When viewing dashboards, note the following considerations:

- If you do not have access to an analysis that is included in a dashboard, then the analysis is not displayed when you view the dashboard.
- If an analysis was deleted from the catalog after it was added to a dashboard, then the analysis is not displayed when you view the dashboard.

Viewing Dashboards

If your user role has the Access V3 Analytics privilege, then you can view dashboards through the Analytics pages. From the Analytics pages, you can open a dashboard by browsing to the dashboard in the catalog, as described in the following procedure. Depending on where the dashboard that you want to view is saved, and on the privileges that are enabled for your role, you might also be able to view the dashboard directly from the Dashboards drop-down list in the Analytics pages. The Dashboards drop-down list can contain a maximum of 300 dashboards and includes the dashboards that are stored in the following locations:

- /Shared Folders/Company Wide Shared Folder
- /Shared Folders/Migrated Company Wide Shared Folder, if your user role includes the Access Migrated Company Wide Shared Folder privilege
- /Shared Folders/Pre-built Analysis, if your user role includes the Access Analytics Dashboards - View Prebuilt Dashboards privilege and the Access Analytics Reports - View Prebuilt Analyses privilege

The following procedure describes how to view a dashboard from the Catalog link in the Analytics pages.

NOTE: For information about the restrictions that apply when viewing dashboards, see Considerations When Editing or Viewing Dashboards (on page 1088).

Before you begin:

- To view a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must include the Access Migrated Company Wide Shared Folder privilege.

- To view prebuilt dashboards, your user role must include the following privileges:
  - Access Analytics Dashboards - View Prebuilt Dashboards
  - Access Analytics Reports - View Prebuilt Analyses

To view a dashboard

1. Click the Analytics tab.
2. In the Home page, click Catalog.
3. Navigate to the dashboard that you want to view.

   NOTE: You can also view individual dashboard pages and subpages.

4. Click the Open icon in the toolbar.

   The dashboard opens to the first dashboard page. If no content has been added, then an empty dashboard page notification message is displayed.

5. In the dashboard, you can perform any of the following tasks, as necessary:
   - Navigate among the pages and subpages in the dashboard by clicking the tabs across the top of the dashboard.
   - Refresh a page or subpage.

     Perform this task to ensure that the refresh operation bypasses saved information in the Oracle BI Presentation Services cache and is issued to the Oracle BI Server for processing.

     When you select a specific dashboard or analysis, Presentation Services checks its cache to determine if the identical results have recently been requested. If so, Presentation Services returns the most recent results, thereby avoiding unnecessary processing by the BI Server and the back-end database. If not, the analysis is issued to the BI Server for processing. You cannot force the analysis past the BI Server's cache.
   - Add a page or subpage to a briefing book.
   - Customize the dashboard pages and subpages, and save your customizations. For more information, see Customizing Dashboard Pages at Runtime (on page 1089).
   - Edit the dashboard, if your user role has the Manage Dashboards privilege.

   Depending on the print and export options that are specified for the dashboard, you might also be able to perform the following tasks:
   - Export the dashboard, page, or subpage to Excel.
   - Print a page or subpage.

Related Topics

See the following topic for additional information:

- Working with My Dashboard (on page 1093)

Customizing Dashboard Pages at Runtime

Depending on the options that have been enabled for an analysis, you might be able to drill into the data in the analysis, apply filters and prompts, sort columns, create groups and calculated items, and expand and collapse sections.

NOTE: Some of these actions might be available to you in the menu that opens when you right-click in certain views in the analysis. For more information about the right-click interactions that can be enabled for an analysis, see Specifying Right-Click Interactions for Users (on page 1037).

After you make changes to a dashboard prompt or you use right-click interactions to make changes to an analysis on a dashboard page at runtime, you can save your changes as a named customization. When you access that dashboard page in the future, you can apply your saved customization to the page, so that you do not need to specify all of your preferences again. Also, when you save a customization for a dashboard page, you can choose to make that customization your default version for the page. In that case, the customization is automatically applied each time that you view the dashboard page in the future.

The following procedure describes how to save a customization for a dashboard page.

To save a customization for a dashboard page

1. At runtime, in the dashboard page, click the Page Options icon.
2. Select Save Current Customization.
3. In the Save Current Customization dialog box:
   a. Enter a name for the customization.
   b. Optionally, select the check box for the option to make this customization your default for this page.
   c. Click OK.

The following procedure describes how to apply a saved customization to a dashboard page.

To apply a saved customization to a dashboard page

1. In the dashboard page, click the Page Options icon.
2. Select Apply Saved Customization, and then select the customization that you want to apply.

The following procedure describes how to clear a customization from a dashboard page. After you clear the customization, the original version of the page is displayed.

To clear a customization from a dashboard page

1. In the dashboard page, click the Page Options icon.
2. Select Clear My Customization.

Creating Dashboards

The following procedure describes how to create a dashboard.

Before you begin. To perform this procedure, your user role must have the Access V3 Analytics privilege and the Manage Dashboards privilege.

To create a dashboard

1. Click the Analytics tab.
2. In the Home page, in the Create section, click Dashboard.
3. In the New Dashboard dialog box, enter a name and description for the dashboard.

   NOTE: The maximum number of characters that you can use in a dashboard name is 512.

4. Select the location where the dashboard is to be saved.

   If you save a dashboard in the Dashboards subfolder directly under /Shared Folders/Company Wide Shared Folder or in the Dashboards subfolder directly under /Shared Folders/Migrated Company Wide Shared Folder, then the dashboard can be included in the Dashboards drop-down list in the Analytics pages, where a maximum of 300 dashboards can be listed. If you save a dashboard in a Dashboards subfolder at any other level (such as /Shared Folders/Sales/Dashboard), or in any other subfolder, then the dashboard cannot be included in the Dashboards drop-down list. To save a dashboard under the /Shared Folders/Migrated Company Wide Shared Folder, your user role must include the Access Migrated Company Wide Shared Folder privilege.

5 Specify whether you want to add content to the new dashboard now or later.
6 Click OK.
7 If you specified to add content:
   a **Now**, then the new dashboard, which contains one blank page, is displayed in the Dashboard builder for editing.
   b **Later**, then an empty dashboard is created (but not displayed) to which you can add content later.

Related Topics

See the following topic for related information:

- Editing Dashboards (on page 1091)

Editing Dashboards

When you edit a dashboard, you can add or delete dashboard pages and subpages, add content to those pages, and edit properties and settings such as print options.

You can add the following types of content to dashboard pages:

- Content that is saved in the catalog, in a folder to which you have access, for example, analyses and pages from other dashboards.
- Dashboard objects

  The following table describes the dashboard objects.

Term	Definition
Columns	Use columns to align the content on a dashboard. You can create as many columns on a dashboard page as you want. The first time that you drag a dashboard object or an item from the catalog to a new dashboard, a column is automatically created. The columns used in dashboards are not related to the columns used in analyses.
Sections	Use sections to organize the content within columns. Any content that you drag and drop from a selection pane to the page layout is placed in a section within a column.
Action Link	Use this object to embed action links in a dashboard. Action links are links that, when clicked, run an associated action.
Action Link Menu	Use this object to embed groups of action links in a dashboard. Users can select the appropriate action to be executed from a group of action links.
Link or Image	Use this object to add links to external pages or to analyses.
Embedded Content	Use this object to embed content from a specified URL in the dashboard.
Text	Use this object to embed text in a dashboard, for example, to provide tips and instructions.
Folder	Use this object to embed a view of an Analytics folder in a dashboard, to allow users to navigate from the dashboard to another analysis in the catalog.

The following procedure describes how to edit a dashboard.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To edit a dashboard

1. Click the Analytics tab.
2. In the Home page, click Catalog.
3. Navigate to the dashboard that you want to edit.

   NOTE: You can also edit an individual dashboard page.

4. Click the Edit icon in the toolbar.
5. In the dashboard builder, perform one or more of the following tasks, as needed:
   - Add a dashboard page or subpage:
     - Click the Add Dashboard Page icon and select the option that you want.
   - Add content to a dashboard page:
     - Drag and drop dashboard objects and items from the catalog to the dashboard page layout.

     For information about the considerations that apply when editing dashboards, see Considerations When Editing or Viewing Dashboards (on page 1088).
   - Delete a dashboard page:
     - Click the tab for the page, and then click the Delete Current Page icon.
   - Use the options available under the Tools icon to:
     - Set dashboard and dashboard page properties.
     - Specify settings for printing and exporting a dashboard page.
     - Specify (in the Report Links dialog box) which links will appear with the analyses in the dashboard page, except for analyses where customized settings have been specified.
     - Specify whether to include or exclude a prompt's Apply and Reset buttons on the dashboard page at runtime. This setting applies to the dashboard page and overrides the Apply and Reset button settings for a prompt's definition and dashboard properties, unless the Prompts Apply Button and Prompts Reset Button fields in the dashboard's properties are set to Use Page Settings.
     - Publish the page to another dashboard in any dashboard location to which you have access. This feature allows you to share the page with others, even if the page is part of dashboard that is saved under My Folders.
     - Set advanced page properties, so that you can set the navigation parameters for the dashboard page or the dashboard.

     NOTE: The option that allows users to create personal saved customizations for the page is always selected and you cannot deselect it.
6. To edit the properties of an object, click the Properties icon for the object.

   For more information, see Editing the Properties of Dashboard Prompts and Analyses (on page 1099).
7. To delete an object from the dashboard page, click the Delete icon for the object.

   NOTE: Deleting an object from a dashboard removes the object from the current dashboard page only. If the object is already saved in the catalog, it is not deleted from the catalog.

8 When you finish making changes, save the dashboard.

TIP: In the dashboard builder, you can preview the dashboard page at any time, by clicking Preview.

9 To exit the dashboard builder and open the Dashboard, click Run.

Working with My Dashboard

A personal dashboard, named My Dashboard, is available to each user in Oracle CRM On Demand. My Dashboard initially has no content. If your user role includes the Access V3 Analytics privilege, then you can access your personal dashboard and add content to it, even if your user role does not allow you to create or edit other dashboards. You can also add pages and subpages to My Dashboard.

The following procedure describes how to access your personal dashboard.

To open My Dashboard

1 Click the Analytics tab.
2 In the Dashboards drop-down list, select My Dashboard.

The following procedure describes how to add content to your personal dashboard.

To add content to My Dashboard

1 Open My Dashboard.
2 Click the Page Options icon and select Edit Dashboard from the drop-down list of options.
3 In the dashboard builder, add the content that you want to the dashboard.
  For more information about editing dashboards, see Editing Dashboards (on page 1091).
4 When you finish making changes, save the dashboard.

Creating Dashboard Prompts

Dashboard prompts allow the end users to specify the data values for filters for some or all of the analyses embedded in the dashboard at runtime. Depending on how a prompt is set up, the filters can determine the content of all of the analyses contained in a dashboard, or all of the analyses on a specific dashboard page.

A prompt that is created at the dashboard level is called a dashboard prompt because the prompt is created outside of a specific dashboard and is stored in the catalog as an object, which can then be added to any dashboard or dashboard page that contains the columns that are specified in the prompt. A dashboard prompt can be a column prompt, variable prompt, image prompt, or currency prompt. Dashboard prompts are reusable, because you can create one prompt and use it many times. When the prompt object is updated and saved, those updates are immediately displayed in all dashboards where the prompt is used.

The following considerations apply when creating dashboard prompts:

- The number of columns that you include in a prompt can affect performance. In general, you should limit the number of columns to as few as possible.
- In most cases, a dashboard prompt can contain columns that are not included in an analysis in the dashboard. Any columns in the prompt that are not included in an analysis do not filter that analysis.

  However, if a dashboard prompt uses column prompts that do not set presentation variables, then all of the columns in the dashboard prompt must be included in the embedded analyses that you want the dashboard prompt to filter. In addition, a filter that has its operator set to Is prompted must be specified for each of the relevant columns in the analyses. The columns in the dashboard prompt do not need to appear in the Selected Columns pane.

To create a dashboard prompt

1 Click the Analytics tab.
2 In the Home page, in the Create section, click Dashboard Prompt.
3 From the Select Subject Area menu, select the subject area for which you want to create a prompt.
4 In the Definition Pane, click the New icon and select the type of prompt that you want.
5 Complete the details for the prompt and then save it.

   For information about the details that you define for a prompt, see the following topics:

   - Adding Column Prompts in Analytics (on page 1042)
   - Adding Currency Prompts in Analytics (on page 1044)
   - Adding Image Prompts in Analytics (on page 1044)
   - Adding Variable Prompts in Analytics (on page 1045)

Adding Prompts to Dashboards

You can add prompts to a dashboard or to the individual pages in a dashboard, to allow users to prompt for different values without having to re-run the dashboard. The value that the user selects in a prompt determines the content of all of the analyses in the dashboard or dashboard page.

You can also add prompts that are hidden from the users who run the dashboard. When a user runs a dashboard that includes a hidden prompt, the analyses in the dashboard or dashboard page are automatically filtered by the default value that you specify in the prompt, and the user cannot select a different value. You can add hidden prompts at dashboard level and at dashboard page level.

NOTE: The dashboard prompt that you want to add to the dashboard must exist in the catalog and must be saved in a folder to which you have access. For information about creating dashboard prompts, see Creating Dashboard Prompts (on page 1093). In addition, if you intend to hide the prompt from users, then a default value must be defined for the prompt.

The following procedure describes how to add a visible prompt to a dashboard.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To add a prompt to a dashboard or dashboard page

1 Open the dashboard in the dashboard builder.

   For information about opening a dashboard in the dashboard builder, see Editing Dashboards (on page 1091).
2 In the dashboard builder, in the Catalog pane, locate the dashboard prompt, and then drag and drop it into a section in the dashboard page.
3 To specify whether the prompt applies to the entire dashboard or to this page only, click the Properties icon for the dashboard prompt object, and select either Dashboard or Page.
4 Save the dashboard.

The following procedure describes how to add a hidden prompt that applies to all of the analyses in a dashboard.

To add a hidden prompt to a dashboard

1 Open the dashboard in the dashboard builder.
2 In the dashboard builder, click the Tools icon and select Dashboard Properties.

3. In the Dashboard Properties dialog box, click the edit icon for the Filters and Variables item.
4. Click the green plus sign (+) icon and then select the dashboard prompt from the catalog.
5. Click OK.

The following procedure describes how to add a hidden prompt that applies to the analyses in a single dashboard page.

To add a hidden prompt to a dashboard page

1. Open the dashboard in the dashboard builder.
2. Click the Tools icon and select Dashboard Properties.
3. In the Dashboard Pages section of the Dashboard Properties dialog box, click on the page where you want to add the prompt, and then click the "Select a prompt to capture default filters and variables" icon.
4. Click the green plus sign (+) icon and then select the dashboard prompt from the catalog.
5. Click OK.

Controlling the Appearance of Dashboard Pages

This topic explains how to control the appearance of dashboard pages.

Columns are used to align the content on a dashboard. The sections within the columns hold the content. You can add or remove columns, and set the width in pixels or as a percentage of the dashboard page.

When you have more than one column on a dashboard page, you can break the columns to arrange them on the page. For example, if you have two columns side by side, breaking the rightmost column causes it to move beneath the first column, and both columns will span the width originally occupied when they were side by side. If you have three columns side by side, breaking the middle column causes the two outer columns to move beneath the first column, and the first column spans the width originally occupied by the first two columns.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To set the width of a column

1. Open the dashboard in the dashboard builder.

   For information about opening a dashboard in the dashboard builder, see Editing Dashboards (on page 1091).
2. In the dashboard builder, click the Properties icon for the column and select Column Properties.
3. In the Column Properties dialog box, expand the Additional Formatting Options link.
4. In the Additional Formatting Options section:
   - If you want the size of the column to be determined by the option selected in the Page Size setting in the Dashboard Properties dialog box, then select Best Fit.
   - If you want to specify the size or the minimum size for the column width, then select Specific Size or Minimum size, and then specify the details of the specific or minimum size, as follows:
     - To specify the width in pixels, enter the number of pixels, for example, 200.
     - To specify the width as a percentage of the dashboard page, use the percent (%) sign, for example, 20%.
5. Click OK.

To add column breaks

- Click the Properties icon for the column, select Break, and then select the appropriate type of break:
  - **No Break.** Select this option to place the column next to the column that is above it.
  - **Column Break.** Select this option to place the column beneath the column that is currently to the left of it (or next to it).
  - **Page Break with Column Break.** Select this option to place the column on another page in printed and PDF versions. This option also places the column below the column that it is next to, if you have not selected the Column Break option.

  NOTE: The Break option is available only if the page has multiple columns and only for columns after the first column.

You can force the first column on the page to always display at the top of the page even when a user scrolls down the page.

To always display the first column at the top of the page

- Click the Properties icon for the first column and select Freeze.

Adding Sections to Columns

Sections are used within columns to hold the content of a dashboard. Sections are aligned vertically by default. You can drag as many sections as you want into a column.

If you drag and drop content into a column without first adding a section to hold the content, a section is created automatically.

If you drag a section from one column into another column, any content in that section is also included.

To add a section to a column

- From the selection pane, drag and drop a Section object from the Dashboard Objects area into the column.

  The column is highlighted when you are at an appropriate location in the column to drop the section.

Arranging Content Within Sections

When you drag an object to a section that already contains a single object, you can choose to drop the object either horizontally or vertically within the section. This sets the layout for the section. However, you can later change the layout for the section, as described here.

To arrange the content in a section horizontally

- Click the Horizontal Layout icon for the section.

To arrange the content in a section vertically

- Click the Vertical Layout icon for the section.

You can also apply formatting to the dashboard, for more information, see Applying Formatting to Dashboards (on page 1100).

Making Content Appear Conditionally on Dashboard Pages

You can make an entire section of a dashboard and its content appear conditionally, based on the Boolean value that is returned by an analysis. Similarly, you can make action links appear conditionally.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To make a section appear conditionally on a dashboard page

1. Open the dashboard in the dashboard builder.

   For information about opening a dashboard in the dashboard builder, see Editing Dashboards (on page 1091).
2. Click the Properties icon for the section and select Condition.
3. In the Section Condition dialog box, create a new condition or select a saved condition from the catalog.
4. Click OK.

To make an action link appear conditionally on a dashboard page

1. Open the dashboard in the dashboard builder.
2. If the action link is not already added to the layout, then add it.
3. Click the Properties icon for the action link object.
4. In the Action Link Properties dialog box:
   a. Select the Conditionally radio button.
   b. In the Condition field, create a new condition or select a saved condition from the catalog.
   c. Click OK.

TIP: If you create a new condition for a section or action link, then you can save the condition to the catalog by clicking the More icon next to the Condition field.

Adding Text Links and Image Links to Dashboard Pages

You can add text links and image links to a dashboard, and specify what is to happen when a user clicks the links. For example, you can direct users to another Web site or dashboard, open documents, launch applications, or perform any other action that your browser supports. You can also add an image or text only, without any links.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To add a text link or image link to a dashboard page

1. Open the dashboard in the dashboard builder.

   For information about opening a dashboard in the dashboard builder, see Editing Dashboards (on page 1091).
2. In the dashboard builder, drag and drop a Link or Image object from the Dashboards Object pane to a section in the dashboard page.
3. Click the Properties icon for the object.

   The Link or Image Properties dialog box appears.
4. Specify your choices:
   - For a text link, enter the text into the Caption field.
   - For an image link, click Select Image; then, in the Select Image dialog box, select an image or enter the location and name of the image into the URL field, and then click OK.

Specify the location as a URL.

If you want a caption for the image, enter a caption for the image in the Caption field, and use the Position drop-down list to choose where the caption is to appear relative to the image.

5. Specify what is to happen when the user clicks the text or image:
   - To specify that an analysis or dashboard is to appear when the user clicks the link or image, select the Analysis or Dashboard radio button, and click the Browse button to select the analysis or dashboard.
   - To specify that another action is to occur, such as opening a Web site, document, or program, specify the destination as a URL, and enter the full path into the field that follows the Destination options. In the Target area, choose whether the destination is to appear in the user's existing browser window or in a new window.

     A link is defined as any URL (Uniform Resource Locator) that your browser can interpret. URLs can point to Web sites, documents, images, FTP sites, newsgroups, and so on. Depending on your browser, the following are examples of valid URLs:

     `http://home.netscape.com/index.html`

     `ftp://ftp.microsoft.com`

     `news:news.announce.newusers`

     See the following table for more information about the kinds of internal or external content to which you can link.

     TIP: When choosing whether the destination is to appear in the user's existing browser window or in a new window, note the following information. For every action except sending mail and executing a program, you can control how the link is to appear. Choose the current window when you want the action to occur in the display pane of the dashboard. The dashboard remains active, but in the background. Choose a new window when you want the action to take place in a new browser window.

     NOTE: To add text or an image only, without any links, leave the field that follows the Destination options blank.
6. Click OK.
7. Save the dashboard.

The following table shows link options for adding a text link or image using the dashboard builder.

Link Option	Comments
Web site or document	You must locate the URL, or address, for the site or document. You can copy the destination address from your browser's address or location text box, and then paste it.
Send email to a specified user	You must know the mailto URL, for example: `mailto:support@oracle.com` When the user selects this link, the browser launches the email application with the To: field filled in. (The browser controls the launching of the email program.)

Adding Views of Analytics Folders to Dashboard Pages

You can add a view of an Analytics folder and its contents to a dashboard. For example, you might have a collection of analyses that you run frequently saved in a folder. You can add a view of that folder to the dashboard. Then, when you view the dashboard, you can open the folder in the dashboard, navigate to a saved request, and click it to run it.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To add a view of an Analytics folder to a dashboard page

1. Open the dashboard in the dashboard builder.

   For information about opening a dashboard in the dashboard builder, see Editing Dashboards (on page 1091).
2. In the dashboard builder, in the Catalog pane, locate the folder that you want, and then drag and drop the folder to a section in the dashboard page.
3. Save the dashboard.

Controlling How Results Display When Users Drill Down in Dashboard Pages

You can control how results are displayed when a user drills down on an analysis in a dashboard. The results can be displayed in one of the following ways:

- The new results can be displayed directly in the dashboard, replacing the original analysis.

  This is the default behavior. The area occupied by the original analysis resizes automatically to hold the new results.
- The entire dashboard can be replaced with the new results.

This behavior is controlled by the Drill in Place option in the dashboard builder. The option is set at the section level, which means that it applies to all drillable analyses within the section. Users can click the browser's Back button to return to the original analysis or the dashboard.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To control how results display when users drill down in dashboard pages

1. Open the dashboard in the dashboard builder.

   For information about opening a dashboard in the dashboard builder, see Editing Dashboards (on page 1091).
2. In the dashboard builder, click the Properties icon for the section and make your selection for the Drill in Place option:
   - To show the new results directly in the dashboard, click Drill in Place to select it. A check mark appears next to this option when it is selected.
   - To replace the dashboard with the new results, click Drill in Place to remove the check mark.

Editing the Properties of Dashboard Prompts and Analyses

You can edit the properties of the dashboard prompts and the analyses that you added to a dashboard from the catalog.

NOTE: When you edit the properties of interactive dashboard prompts and analyses as described here, any other changes that you made to the page you are working on are also saved.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage

Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To edit the properties of a dashboard prompt

1. Open the dashboard in the dashboard builder.

   For information about opening a dashboard in the dashboard builder, see Editing Dashboards (on page 1091).
2. Click the Properties icon for the dashboard prompt and select the property that you want to modify:
   - Scope.

     Select whether you want the prompt to apply to all analyses in the dashboard, or only to the analyses in the current page.
   - Prompt Links.

     Specify whether you want users to see the Edit link for the prompt at runtime.
3. Click OK.
4. Save the dashboard.

To edit the properties of an analysis in a dashboard

1. Open the dashboard in the dashboard builder.
2. In the dashboard builder, click the Properties icon for the analysis and select the property that you want to modify:
   - Display Results

     If you select the Embedded in Section option, the request will be executed automatically and the results displayed directly in the dashboard. This option is selected by default for analyses.

     Alternatively, you can select to display the request as a link that users must click to execute the request, and you can specify whether the results are to show in the dashboard or in a separate window.
   - Report Links

     This option opens the Report Links dialog box, where you can select the links that you want to appear with the analysis on the dashboard page.
   - Show View

     This option shows the available views of the analysis. You can select the view that you want to see.
   - Rename

     This option opens the Rename dialog box, where you can enter a new name for the analysis.
3. Click OK.
4. Save the dashboard.

Applying Formatting to Dashboards

In the dashboard builder, a formatting dialog box provides access to and control over the visual attributes of dashboards. Depending on the object that you are formatting, the dialog box displays different options, such as font, cell, and border controls, background color, and additional formatting options, such as cell padding. The formatting affects the visual appearance of the columns and sections on a dashboard, such as background color and borders.

When selections for horizontal and vertical alignment appear, they are similar to text justification selections in word processors. Vertical alignment does not have any impact unless the column spans multiple rows of the other columns.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To apply formatting to a dashboard

1 Open the dashboard in the dashboard builder.

For information about opening a dashboard in the dashboard builder, see Editing Dashboards (on page 1091).

2 In the dashboard builder, click the Properties button for a column or section and choose the Column Properties or Format Section option.

3 In the Cell area, set up the alignment and background color.

NOTE: For horizontal alignment, the most common justification for text data is left. For numeric data, the most common justification is right.

Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

4 In the Border area, make your selections for the border position, color, and style of the cell.

TIP: You can select or deselect custom borders by clicking the top, bottom, left, and right borders near the Position drop-down list.

5 To format spacing within the cell, click Additional Formatting Options and specify values for the width and height of the cell contents, and the space above, below, left and right of the contents.

Values are specified in pixels.

6 To override the style and class elements specified in Oracle CRM On Demand style sheets, make your selections in the Custom CSS Style Options area:

a Click the settings that you want to use.

b Provide the location of the class, style, or style sheet.

NOTE: The advanced style formatting options are for users who know how to work with cascading style sheets.

7 Click OK.

Changing Print and Export Options for Dashboards

You can specify the page settings and header and footer content for the PDF output from a dashboard. Dashboards and views are printed in Adobe Acrobat PDF format. Adobe Reader 6.0 or greater is required to print using Adobe PDF.

If you add a header or footer, the text appears in both the printable HTML output and the PDF output, and in general, the formatting that you apply to the header or footer text is applied in both types of output. However, the options for overriding the style and class elements specified in Oracle CRM On Demand style sheets apply to HTML output only.

NOTE: The print selections that you specify apply to PDF output only. If you print the PDF on a local or network printer, the print selections specified in your browser are in effect, such as the selection for paper size.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To change the print and export options for a dashboard

1. Open the dashboard in the dashboard builder.

   For information about opening a dashboard in the dashboard builder, see Editing Dashboards (on page 1091).
2. Click the Tools icon and select Print and Export Properties.

   The Print and Export Control dialog box appears.
3. Make your selections for the page settings.

   NOTE: The Standard Print Layouts options determine whether users can print the dashboard, and the Standard Excel Output options determine whether users can export the dashboard and pages from the dashboard. These settings apply when users run the dashboard from an area where it is embedded, such as a Web applet, Web tab, or Web link, as well as when users run the dashboard from the Analytics pages. If you want to prevent users from printing the dashboard, or exporting the dashboard and dashboard pages, then deselect the appropriate check boxes.
4. To add a header or footer, do the following:
   a. Select the appropriate option, and click Edit.
   b. Use the options in the dialog box to construct the header or footer.

      Headers and footers can each contain up to three lines.
   c. To apply cosmetic formatting to a header or footer element, click the formatting button to open the Edit Format dialog box.
   d. Make your selections for the font, cell area, border area, and additional formatting options.

      NOTE: You can find more information about some of the formatting options in Applying Formatting to Dashboards (on page 1100).
   e. Click OK to close the Edit Format dialog box.
   f. Click OK to save the header or footer.
5. When you finish changing the print and export options, click OK.

Changing Dashboard Properties

You can set the properties for the entire dashboard, and you can delete, reorder, and hide pages. Changing the dashboard properties automatically saves any changes you made to the page that you were working on.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To change the properties of a dashboard

1. Open the dashboard in the dashboard builder.

   For information about opening a dashboard in the dashboard builder, see Editing Dashboards (on page 1091).
2. Click the Tools icon and select Dashboard Properties.
3. In the Dashboard Properties dialog box, make your changes.

   The following are some of the actions that you can perform in the Dashboard Properties dialog box:
   - Add a description for the dashboard. Descriptions are stored but do not appear on the dashboards.
   - Reorder the dashboard pages. Select the page you want to move and use the directional arrows to move the page to its new location.

- Hide a dashboard page. This allows you to hide the page from other users. For example, if you are currently making changes to the page, then you might want to hide the page from other users until after you complete your changes. However, if any users are currently viewing the page, the page remains visible to those users.

  After you finish making your changes, you must deselect the Hide Page check box again to make the page visible to other users.

  CAUTION: Other than hiding or reordering pages, any actions that you perform in the Dashboard Pages section of the Dashboard Properties dialog box are not undone if you click Cancel to close the dialog box.

- Rename a dashboard page. When you rename a dashboard page, you can preserve users' references to the old name. This action creates a shortcut with the old name that points to the renamed dashboard page in the catalog.
- Delete a dashboard page.

4 Click OK to save your changes.

NOTE: You cannot change the permissions on a dashboard page. The Security icon in the Dashboard Properties dialog box is disabled.

Renaming Dashboards

The following procedure describes how to rename a dashboard.

Before you begin. To edit a dashboard, your user role must have the Access V3 Analytics privilege. To edit dashboards other than your own personal dashboard (My Dashboard), your user role must also have the Manage Dashboards privilege. In addition, to edit a custom dashboard that is stored under /Shared Folders/Migrated Company Wide Shared Folder, your user role must have the Access Migrated Company Wide Shared Folder privilege.

To rename a dashboard

1. Click the Analytics tab.
2. In the Home page, click Catalog.
3. Navigate to the dashboard that you want to rename.
4. Right-click the dashboard name and select Rename from the drop-down menu.
5. Enter the new name for the dashboard.

   When you rename a dashboard, you can preserve users' references to the old name. This action creates a shortcut with the old name that points to the renamed dashboard in the catalog.
6. Click OK to save your changes.

Managing Dashboard Visibility in Analytics

If you have the Manage Roles and Access privilege and the Manage Dashboards privilege and in your role, then you can control the availability (visibility) of individual dashboards. You assign visibility based on user roles. For example, you can select a dashboard and then allow the user roles of Service Rep and Service Manager to display that dashboard.

If you have never assigned any visibility to a dashboard, then that dashboard is unrestricted and can be displayed for all users. Administrators and users with the Manage Custom Reports privilege always have access to all dashboards, even if their role has not been granted access.

Note: The privilege, Access Analytics Dashboards - View Prebuilt Dashboards, controls users' access to prebuilt dashboards, but it does not affect their access to custom dashboards.

To assign visibility to a dashboard

1. Click the Analytics tab.
2. Click Dashboards in the Manage pane.
3. Navigate to the folder containing a dashboard, such as the Company Wide Shared Folder.
4. Select a dashboard from the list, and click edit to display the Dashboard Visibility page.
5. Click Add Roles.
6. In the Associated Roles page, click Select next to each role that must have access to the selected dashboard.
7. When done adding roles, click OK.
8. To return to the Manage Dashboard Visibility page, click the Back to Manage Dashboard Visibility link.

To remove a role's visibility to a dashboard

1. Click the Analytics tab.
2. Click Dashboards in the Manage pane.
3. Navigate to the folder containing a dashboard, such as the Company Wide Shared Folder.
4. Select a dashboard from the list, and click edit to display the Dashboard Detail page.
5. In the Associated Role pane, click Remove next to the role or roles to be removed.
6. Click OK to confirm the removal.
7. When done editing roles, click OK.
8. To return to the Manage Dashboard Visibility page, click the Back to Manage Dashboard Visibility link.

If you remove all roles from the list of roles, then the dashboard is no longer restricted and can be displayed for all users.

Prebuilt Dashboards - Customer Dashboard

The Customer dashboard contains information about your assigned customers and includes analyses by closed sales, expected sales, and demographic attributes. You can filter these analyses based on:

- Fiscal Quarter
- Fiscal Year
- Region
- Industry
- Reporting Level

After adjusting any of the filter values, click Apply to apply the new filter selections to the analyses.

To display the Customer dashboard in the Analytics tab, pull down the Dashboards menu and choose Customer.

NOTE: In the prebuilt dashboard, the field labeled *Data was refreshed as of* shows the value of the USER_LAST_REFRESH_DT session variable. This variable holds the timestamp, in the user's timezone, of the start of the most recent refresh of the historical data. In earlier releases of the Analytics functionality, the prebuilt analyses showed the value of the LAST_REFRESH_DT variable.

Prebuilt Dashboards - Overview Dashboard

The Overview dashboard contains information about your sales outlook, service effectiveness, top customers, and opportunities. You can filter these analyses based on:

- Fiscal Quarter
- Fiscal Year
- Region

After adjusting any of the filter values, click Apply to apply the new filter selections to the analyses.

To display the Overview dashboard in the Analytics tab, pull down the Dashboards menu and choose Overview.

NOTE: In the prebuilt dashboard, the field labeled *Data was refreshed as of* shows the value of the USER_LAST_REFRESH_DT session variable. This variable holds the timestamp, in the user's timezone, of the start of the most recent refresh of the historical data. In earlier releases of the Analytics functionality, the prebuilt analyses showed the value of the LAST_REFRESH_DT variable.

Prebuilt Dashboards - Pipeline Dashboard

The Pipeline dashboard contains information about your expected sales, closed sales, quality and distribution of your pipeline, customers and includes analyses by closed sales, expected sales, and demographic attributes. You can filter these analyses based on:

- Fiscal Quarter
- Fiscal Year
- Industry
- Deal Size
- Pipeline Fiscal Quarter
- Pipeline Fiscal Year

After adjusting any of the filter values, click Apply to apply the new filter selections to the analyses.

To display the Pipeline dashboard in the Analytics tab, pull down the Dashboards menu and choose Pipeline.

NOTE: In the prebuilt dashboard, the field labeled *Data was refreshed as of* shows the value of the USER_LAST_REFRESH_DT session variable. This variable holds the timestamp, in the user's timezone, of the start of the most recent refresh of the historical data. In earlier releases of the Analytics functionality, the prebuilt analyses showed the value of the LAST_REFRESH_DT variable.

Prebuilt Dashboards - Sales Effectiveness Dashboard

The Sales Effectiveness dashboard contains information about your deals. You can filter these analyses based on:

- Fiscal Quarter
- Fiscal Year
- Region
- Industry
- Reporting Level

After adjusting any of the filter values, click Apply to apply the new filter selections to the analyses.

To display the Sales Effectiveness dashboard in the Analytics tab, pull down the Dashboards menu and choose Sales Effectiveness.

NOTE: In the prebuilt dashboard, the field labeled *Data was refreshed as of* shows the value of the USER_LAST_REFRESH_DT session variable. This variable holds the timestamp, in the user's timezone, of the start of the most recent refresh of the historical data. In earlier releases of the Analytics functionality, the prebuilt analyses showed the value of the LAST_REFRESH_DT variable.

Prebuilt Dashboards - Marketing Effectiveness Dashboard

The Marketing Effectiveness dashboard contains information about your campaigns and includes analyses for completed campaigns, lead aging, follow-up status, lead source trends, and opportunity volume. You can filter these analyses based on:

- Fiscal Quarter

- Fiscal Year

After adjusting any of the filter values, click Apply to apply the new filter selections to the analyses.

To display the Marketing Effectiveness dashboard in the Analytics tab, pull down the Dashboards menu and choose Marketing Effectiveness.

NOTE: In the prebuilt dashboard, the field labeled *Data was refreshed as of* shows the value of the USER_LAST_REFRESH_DT session variable. This variable holds the timestamp, in the user's timezone, of the start of the most recent refresh of the historical data. In earlier releases of the Analytics functionality, the prebuilt analyses showed the value of the LAST_REFRESH_DT variable.

Prebuilt Dashboards - Service Dashboard

The Service dashboard contains information about your service levels and customer loyalty. You can filter these analyses based on:

- Fiscal Quarter
- Fiscal Year
- Status

After adjusting any of the filter values, click Apply to apply the new filter selections to the analyses.

To display the Service dashboard in the Analytics tab, pull down the Dashboards menu and choose Service.

NOTE: In the prebuilt dashboard, the field labeled *Data was refreshed as of* shows the value of the USER_LAST_REFRESH_DT session variable. This variable holds the timestamp, in the user's timezone, of the start of the most recent refresh of the historical data. In earlier releases of the Analytics functionality, the prebuilt analyses showed the value of the LAST_REFRESH_DT variable.

Working with Briefing Books

A briefing book is a collection of analyses and dashboard pages that you build over time. For example, you can create a briefing book for service requests and each month add the most recent service request analyses to that briefing book. You can then open the briefing book and see how service requests have changed over time. You can then export the briefing book in PDF or MHTML format to share it with others.

The analyses and dashboard pages you add to each briefing book can be either updatable (content that refreshes with the latest data each time you open the briefing book) or a snapshot (content remains the same). Use the snapshot to preserve the data so it can be compared over time.

The following table shows the effects of privileges on actions you can take:

Privilege	Download (PDF and MHTML)	Manage Briefing Books into *My Folders*	Manage Briefing Books into *Shared Folders*
Access V3 Analytics	Yes		
Manage Personal Reports	Yes	Yes	
Manage Custom Reports	Yes	Yes	Yes

Be aware that the content of analyses and dashboard pages you add to briefing books are affected by the object's Print Rows setting. The Print Rows setting is found in the Print & Export Options dialog box in the Results tab for each analysis and on a dashboard page in the Tools menu, and you can set it to Visible or All. If Print Rows is set to Visible, then only rows visible to the person who added the analysis or dashboard page to the briefing book can appear. If Print Rows is set to All, then all rows appear in the briefing book.

You can perform the following tasks with briefing books:

- Creating Briefing Books (on page 1107)
- Adding Analyses to Briefing Books (on page 1108)
- Adding Dashboard Pages to Briefing Books (on page 1108)
- Editing Briefing Books (on page 1110)
- Displaying and Exporting Briefing Books (on page 1110)

Creating Briefing Books

You can create as many briefing books as you need, for example, you can create one for each sales division in your company, one for each product, and so on.

To create a new briefing book from a saved analysis or dashboard page

1. In the Analytics tabs, click Catalog.
2. To add an analysis, follow these steps:
   a. Navigate to an analysis.
   b. Under the name of the analysis right-click (or pull down the More menu, depending on the view type) and choose Add to Briefing Book.
3. To add a dashboard page, follow these steps:
   a. Navigate to a dashboard page.
   b. Click Run to run the dashboard page.
   c. Pull down the Tools menu and choose Add to Briefing Book.
4. In the Content Type section, select one of the following:
   - **Updatable.** When you open the briefing book in the future, the contents of the analysis updates with the latest information.
   - **Snapshot**. When you open the briefing book in the future, the contents of the analysis are exactly as you see them now. This enables you to save this analysis as-is so you can compare it with same analysis run at a different time. For example, you could add a snapshot of the same analysis every month for a year and then you have the ability to evaluate the changes month to month.
5. In the Follow Briefing Book Navigation Links section, select one of the following. A navigation link is a link from the contents section of the briefing book to a specific section within the briefing book. This is the equivalent of making hyperlinks in a table of contents to chapters in a book. You define the navigation links in a later step.
   - **No.** Do not include navigation links in the briefing book.
   - **Yes.** Include navigation links in the briefing book. If you select Yes, then you also must specify the number of links to follow (maximum of five).
6. Enter a text description of the briefing book.
7. Click Browse to display the Save As dialog box.
8. Select a location for the briefing book, in the Name field enter a name for this briefing book and click OK to close the Save As dialog box.
9. In the Save Briefing Book Content dialog box, click OK.

   Oracle CRM On Demand displays a message that the selected object is now added to the briefing book.

For more information on briefing books, see:

- Working with Briefing Books (on page 1106)

Adding Analyses to Briefing Books

You can add multiple analyses to a briefing book. When adding an analysis to a briefing book the existing content of that book is not overwritten or replaced, the new analysis is added as a separate object within the briefing book. For example, you can open the same analysis every month and save its snapshot to a briefing book. This enables you to track how the results of the same analysis varies over time.

To add a saved analysis to an existing briefing book

1. In the Analytics tabs, click Catalog.
2. Navigate to an analysis.
3. Under the name of the analysis right-click (or pull down the More menu, depending on the view type) and choose Add to Briefing Book.
4. In the Content Type section, select one of the following:
   - **Updatable.** When you open the briefing book in the future, the contents of the analysis updates with the latest information.
   - **Snapshot**. When you open the briefing book in the future, the contents of the analysis are exactly as you see them now. This enables you to save this analysis as-is so you can compare it with same analysis run at a different time. For example, you could add a snapshot of the same analysis every month for a year and then you have the ability to evaluate the changes month to month.
5. In the Follow Briefing Book Navigation Links section, select one of the following. A navigation link is a link from the contents section of the briefing book to a specific section within the briefing book. This is the equivalent of making hyperlinks in a table of contents to chapters in a book. You define the navigation links in a later step.
   - **No.** Do not include navigation links in the briefing book.
   - **Yes.** Include navigation links in the briefing book. If you select Yes, then you also must specify the number of links to follow (maximum of five).
6. Click Browse to display the Save As dialog box.
7. Navigate to an existing briefing book and select it, click OK to close the Save As dialog box.
8. In the Save Briefing Book Content dialog box, click OK.

   Oracle CRM On Demand displays a message that the analysis is now added to the briefing book.

For more information on briefing books, see:

Adding Dashboard Pages to Briefing Books

You can add multiple dashboards pages to a briefing book. For example, you can open the same dashboard page every month and save its snapshot to a briefing book. This enables you to track how the results of the same dashboard page varies over time.

To add a dashboard page to an existing briefing book

1 In the Analytics tabs, click Catalog.
2 Navigate to a dashboard page.
3 Pull down the menu icon in the upper-right corner of the Overview tab, and choose Add to Briefing Book.
4 In the Content Type section, select one of the following:
   - **Updatable.** When you open the briefing book in the future, the contents of the analysis updates with the latest information.
   - **Snapshot**. When you open the briefing book in the future, the contents of the analysis are exactly as you see them now. This enables you to save this analysis as-is so you can compare it with same analysis run at a different time. For example, you could add a snapshot of the same analysis every month for a year and then you have the ability to evaluate the changes month to month.
5 In the Follow Briefing Book Navigation Links section, select one of the following. A navigation link is a link from the contents section of the briefing book to a specific section within the briefing book. This is the equivalent of making hyperlinks in a table of contents to chapters in a book. You define the navigation links in a later step.
   - **No.** Do not include navigation links in the briefing book.
   - **Yes.** Include navigation links in the briefing book. If you select Yes, then you also must specify the number of links to follow (maximum of five).
6 Click Browse to display the Save As dialog box.
7 Navigate to an existing briefing book and select it, and click OK to close the Save As dialog box.
8 In the Save Briefing Book Content dialog box, click OK.

   Oracle CRM On Demand displays a message that the dashboard page is now added to the briefing book.

To add action links as briefing book navigation links

1 Navigate to a dashboard page.
2 In the Dashboard Object pane, click Action Link and drag it into the right pane.
3 On the action link, click its Properties icon in the upper right.
4 In the Action Link Properties dialog box, enter values for Link Text and Caption.
5 Click the New Action icon, and choose Navigate to BI Content.
6 In the Select BI Content For Action dialog box, select an analysis and click OK.
7 In the New Action dialog box, click OK.
8 In the Action Link Properties dialog box, select Add to Briefing Book and click OK.
9 In the dashboard pane, click the Save icon.
10 To test the link, click the Run icon.

   The dashboard page opens and should contain your link, the icon to the left of the link should be a briefing book. Click the link to make sure it works. When done, click Return to display the dashboard page.

   When you add the dashboard page (with Follow Briefing Book Navigation Links set to Yes) to the briefing book, the navigation target (the analysis) that was selected in the Select BI Content Action dialog box for the action, is also included in the briefing book, therefore when you download the briefing book the navigation link appears. When you click the link you navigate to the specific analysis.
11 To add this dashboard page to a briefing book, pull down the menu in the upper-right corner and choose Add to Briefing Book.
12 Follow the instructions above to continue the task.

For more information on briefing books, see:

- Working with Briefing Books (on page 1106)
- Creating Briefing Books (on page 1107)
- Adding Analyses to Briefing Books (on page 1108)
- Editing Briefing Books (on page 1110)
- Displaying and Exporting Briefing Books (on page 1110)

Editing Briefing Books

After you have created a briefing book and populated it with analyses and dashboard pages, you can edit it to customize its content.

To edit a briefing book

1. In the Catalog, locate a briefing book and click its Edit link.

   The Edit Briefing Book dialog box opens.
2. To rearrange the order of objects within the briefing book, drag and drop the objects as desired.
3. To edit an analysis or dashboard page, select it from the list and click the edit icon in the upper right.
4. Now edit the Page Properties of the object (Content Type, Follow Briefing Book Navigation Links, and Description.)
5. Click OK to close the Page Properties dialog box.
6. Click OK to close the Edit Briefing Book dialog box.

For more information on briefing books, see:

- Working with Briefing Books (on page 1106)
- Creating Briefing Books (on page 1107)
- Adding Analyses to Briefing Books (on page 1108)
- Adding Dashboard Pages to Briefing Books (on page 1108)
- Displaying and Exporting Briefing Books (on page 1110)

Displaying and Exporting Briefing Books

You can display and export a briefing book as either a PDF file or a Web Archive (MHTML) file.

To display and export a briefing book

1. In the Catalog, locate a briefing book.
2. To download and display a PDF, click its PDF link.

   The briefing book downloads and opens as a PDF document. This document includes a Table of Contents page.
3. To download and display the briefing book in a Web browser, click Web Archive (.mht).

   Using the browser's controls, save the briefing book to your local computer.

For more information on briefing books, see:

- Working with Briefing Books (on page 1106)
- Creating Briefing Books (on page 1107)
- Adding Analyses to Briefing Books (on page 1108)
- Adding Dashboard Pages to Briefing Books (on page 1108)
- Editing Briefing Books (on page 1110)

16 Administering Oracle CRM On Demand

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

This section	Describes these tasks
Company Administration (on page 1122)	Setting Up Your Company Profile and Global Defaults (on page 1123) Verifying License Statuses and Active Users (on page 1151) Defining Your Company's Password Controls (on page 1152) Resetting All Passwords (on page 1159) Activating Languages (on page 1160) Defining a Custom Fiscal Calendar (on page 1162) Managing Currencies (on page 1165) Creating Divisions (on page 1170) Associating Picklist Value Groups with Divisions (on page 1170) Associating Users with Divisions (on page 1171) Reviewing Sign-In Activity for All Users (on page 1174) Restricting Use to IP Addresses (on page 1160) Reviewing Your Company's Resource Usage (see Reviewing Your Company's Resource Usage on page 1175) Reviewing Audit Trail Changes with the Master Audit Trail (on page 1176) Reviewing the Audit Trail for Administration Configuration Changes (on page 1177) Reviewing Your Company's Pending and Sent Emails (on page 1178) Reviewing All Export Requests for Your Company (on page 1181) Publishing Company-Wide Alerts (on page 1183) Viewing Service Allotment Usage for Your Company (on page 1188) Viewing Historical Service Allotment Usage (on page 1189) Setting Alerts for Service Allotments (on page 1190) Viewing File and Record Utilization Information (on page 1190)

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	Converting Unshared Addresses to Shared Addresses (on page 1192) Considerations When Turning Off Shared Addresses (on page 1194) Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses (on page 1195) Setting the Address Type for Unshared Addresses Using Edit Rel (on page 1196) Access Profile and Role Settings for Addresses (on page 1196)
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This section	Describes these tasks
	Tasks for Application Setup

This section	Describes these tasks
User Management and Access Controls (on page 1361)	Setting Up Users (on page 1363) Setting Up Users' Sales Quotas (on page 1377) Setting Up Default Books by Record Type for a User (on page 1377) Changing a User's User ID (on page 1378) Resetting a User's Password (on page 1379) Resetting a User's DMS PIN (on page 1379) Changing the Primary Division for a User (on page 1380) Reviewing Sign-In Activity for a User (on page 1380) Reviewing Security-Related Activities for Users (on page 1380) Managing Delegated Users (Administrator) (on page 1382) Creating Inventory Periods for Users (on page 1384) Deactivating Users (on page 1384) Setting Up Users (Partners) (on page 1386) Changing a User's User ID (Partners) (on page 1388) Resetting a User's Password (Partners) (on page 1388) Deactivating Users (Partners) (on page 1389) Adding Roles (on page 1396) Process of Setting Up Access Profiles (on page 1416) Resetting Personalized Page Layouts (on page 1420) Resetting Personalized Action Bar Layouts (on page 1420) Resetting Personalized Homepage Layouts (on page 1420) Setting Up Groups (on page 1461) Setting Up Territories (on page 1463) Process of Setting Up Books (on page 1441) Verifying Book Setup for the Administrator Role (on page 1441) Creating Book Types and Book User Roles (on page 1445) Configuring Record Ownership Modes (on page 1446) Creating Books and Book Hierarchies (on page 1446) Associating Users with Books (on page 1448) Creating Access Profiles for Books (on page 1450) Enabling Books for Your Company (on page 1451) Enabling Books for Users and User Roles (on page 1451) Adding Books to Record Detail Page Layouts (on page 1453)

This section	Describes these tasks
	Assigning Records to Books (on page 1454)

This section	Describes these tasks
Business Process Management (on page 1478)	Creating Processes (on page 1484)

This section	Describes these tasks
	Adding Transition States to Processes (on page 1485) Restricting Processes (on page 1487) Configuring the Field Setup for Transition States (on page 1487) Enabling Access Controls for Related Record Types (on page 1488) Creating Workflow Rules (on page 1511) Creating Workflow Actions: Assign a Book (on page 1529) Creating Workflow Actions: Create Task (on page 1534) Creating Workflow Actions: Create Integration Event (on page 1531) Creating Workflow Actions: Send Email (on page 1538) Creating Workflow Actions: Update Values (on page 1543) Creating Workflow Actions: Wait (on page 1545) Changing the Order of Workflow Rule Actions (on page 1548) Changing the Order of Workflow Rules (on page 1548) Deactivating Workflow Rules and Actions (on page 1549) Deleting Workflow Rules and Actions (on page 1550) Viewing Error Instances in the Workflow Error Monitor (on page 1552) Deleting Error Instances from the Workflow Error Monitor (on page 1553) Viewing Pending Instances in the Workflow Wait Monitor (on page 1558) Deleting Pending Instances from the Workflow Wait Monitor (on page 1559) Setting Up Assignment Rules (on page 1566) Mapping Additional Fields During Lead Conversion (on page 1571) Creating Lead Conversion Layouts (on page 1572) Setting Up the Forecast Definition (on page 1575) Updating the Forecast Definition (on page 1580) Setting Up Sales Processes, Categories, and Coaches (on page 1581) Customizing Your Company's Industry List (on page 1587) Enabling the Modification Tracking Feature (on page 1589) Viewing the Modification Tracking List Page (see Viewing the Modification Tracking List Page on page 1604) Creating Modification Records Manually (on page 1608)

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Desktop Integration Administration (see Oracle CRM On Demand Desktop on page 1884)	Administering Customization Packages (on page 1884) Setting Oracle CRM On Demand Desktop Installer Version Locations (on page 1885)

Additionally, administrators can usually do the following:

- Create custom reports for their own use or for company-wide distribution. For instructions, see Working with the Analytics Homepage (see Working with the Analytics Homepage on page 789).
- Create filtered lists for company-wide distribution. For instructions, see Working with Lists (on page 125).

For information about using Oracle On Demand Expression Builder, see Expression Builder (on page 1886).

Processes for Administering Oracle CRM On Demand

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

1. Review all available resources.

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

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

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

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

   - Define data visibility and how the data will be secured by considering the following factors and functionality:

     - **Access Profiles.** For more information, see Access Profile Management (on page 1403).
     - **Teams.** For more information, see Sharing Records (Teams) (on page 146).
     - **Books.** For more information, see Book Management (on page 1421).
     - **Manager Visibility.** For more information, see Setting Up Your Company Profile and Global Defaults (on page 1123).

   - Define the data model and relevant fields. Evaluate which reports require trend analysis, real-time trend analysis, and the record types that they support.
   - Define the following processes associated with validating and interacting with data:

     - Setting up sales processes. For more information see Setting Up Sales Processes, Categories, and Coaches (on page 1581).
     - Defining lead conversion layouts and field mappings. For more information, see Lead Conversion Administration (on page 1570).
     - Defining field validation. For more information, see About Field Management (on page 1201).
     - Defining workflow processes. For more information, see Business Process Management (on page 1478).
     - Integrating Oracle CRM On Demand with Web services. For more information, see Web Services Integration (on page 1838).

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

3 Set up your company.

Each company is unique. In Oracle CRM On Demand, you can customize many company settings so that they match your business setup.

- Set up your company's fiscal year, languages, currencies, exchange rates, and so on.
- Request the appropriate access rights and CTE. For more information on setting up your company, see Setting Up Your Company Profile and Global Defaults (on page 1123).

4 Set up your user profiles.

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

- Set up the roles for your Oracle CRM On Demand users. For more information, see Adding Roles (on page 1396).
- Set up the access profiles for your company. For more information, see Access Profile Management (on page 1403).
- Set up your visibility model, for example, books, teams, and so on. For more information, see Book Management (on page 1421) and Sharing Records (Teams) (on page 146).

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

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

- Add the new fields and record types required for the definition of your data model. For more information, see Creating and Editing Fields (on page 1219) and Adding Record Types (on page 1346).
- Rename the fields and record types to match your specific business terms. For more information, see Managing Field Labels (on page 1250) and Renaming Record Types (on page 1343).
- Populate picklists. You can use the import functionality to import large numbers of picklist values to picklist fields quickly. For more information, see Changing Picklist Values (on page 1254).
- Configure layouts. Display only the fields required for each role and to use dynamic layouts. For more information, see Customizing Static Page Layouts (on page 1267) and Specifying Dynamic Page Layouts (on page 1314).
- Configure your processes such as workflows, sales processes, and so on. For more information, see Business Process Management (on page 1478) and Setting Up Sales Processes, Categories, and Coaches (on page 1581).
- Configure lists for roles. The first 10 lists appear on a user's homepage. It is recommended that lists do not return large amounts of data. Twenty-five to 100 records is the recommended manageable number of records for daily tasks. It is also recommended to do the following:
  - Use indexed fields whenever possible.
  - In the list, include fields that users want to update frequently.

  For more information on configuring lists, see Creating and Refining Lists (on page 130).

6 Provide information about business metrics by generating reports.

Use the Analytics functionality in Oracle CRM On Demand to generate custom reports that are relevant to your business needs, and then make them accessible to users. For more information on reports, see Analytics (on page 789).

7 Import your data and users.

Use the import functionality to import legacy data to Oracle CRM On Demand. You can import all of your users, or add them all manually through the User Management page. When users have been added, they receive an email with their temporary password to access Oracle CRM On Demand, and they can start working immediately. For more information on importing data, see Import and Export Tools (on page 1610).

Using Administrator Templates During Setup

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

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

To access administrator setup templates

1. Click the link for the template you want.

   Links for the available templates are shown in the following section.
2. Save the template to your computer.
3. Open the saved file.

About Usage Tracking in Oracle CRM On Demand

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

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

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

TIP: For information about reviewing Web services usage, see Reviewing Web Services Utilization (on page 1841).

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

About the Usage Tracking Privilege

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

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

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

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

In Oracle CRM On Demand, you can view data about service allotment usage, see Viewing Service Allotment Usage for Your Company (on page 1188) and Viewing Historical Service Allotment Usage (on page 1189) and data about file and record usage, see Viewing File and Record Utilization Information (on page 1190).

Related Topics

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

- Usage Tracking Analytic Subject Area (see Usage Tracking Analysis Historical Analytics Subject Area on page 895)
- Getting Started with Analytics (on page 816)

Company Administration

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

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

Company Profile

Setting up the company profile includes:

Setting Up Your Company Profile and Global Defaults

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

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

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

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

Before you begin. To understand the effect of these settings, read About Profile Settings for Users (on page 741).

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

To edit your company profile

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

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

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

Configuring Company Key Information

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

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

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

Configuring Company Settings

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

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

Field	Description
Default Language	The language used as the default for your users. You can activate additional languages so that users can change the setting for their own use. For information on how to add languages, see Activating Languages (on page 1160). To update this field, contact Customer Care.

Field	Description
Default Locale	The regional settings used as a default for your users. Users can change the setting for their own use at any time from the User Profile page. These settings determine the formatting for dates, time, currency, numbers, and phone numbers.
Default Currency	The currency used as a default for your users. You can activate additional currencies so that users can change the setting for their own use (see Managing Currencies (on page 1165)). However, the currency set here determines the default currency used for forecasts, which are company-wide. To update this field, contact Customer Care.
Default Time Zone	Default time zone for your company. Some functions, such as forecast generation, use the time zone of the hosting facility instead of this default time zone. Contact Customer Care to find out this time zone. Users in other regions can choose to use their local time zone, which is set on the User Profile page. To update this field, contact Customer Care.
Record Preview Mode	The record preview mode for your company. You can enable the record preview functionality, and specify how the preview window opens. Depending on the setting that you select in this field, a preview window opens when users rest their pointer on a link to a record, or when they click a preview icon that appears when they rest their pointer on a link to a record. The preview window shows the first section of the Detail page of the record. You also have the option of disabling the record preview functionality by selecting Off in this field. By default, this field is set to Click on Preview Icon when Oracle CRM On Demand is first set up for a new company. Users can override the company setting by specifying a different record preview mode in their Personal Detail page.
Inline Edit Enabled	Enables or disables the inline editing feature. When inline editing is enabled, users can edit fields directly on List pages and on Detail pages (that is, without opening the Edit page for the record). Inline editing is supported in record List pages, record Detail pages, and in many linked records on main record Detail pages. In addition, in many List pages and lists of linked records on main record Detail pages, users can edit multiple fields in multiple records inline at the same time. Note that the following types of fields in linked records cannot be edited from the Detail page of the main record:

Field	Description
	- Fields that are not shown in the Detail page of the linked record itself - Calculated fields, for example, Full Name - Fields that are read-only on the Edit page of the linked record Also, in cases where the same linked record can show up under multiple main records, the fields that are part of the relationship can be edited. However, the fields that belong to the linked record itself cannot be edited. For example in the Account Team related list on an account record, the Team Role field can be edited, because the field is part of the relationship between the account and the team member. However, the Last Name and First Name fields cannot be edited, because they belong to the user record (of the team member).
Message Center Enabled	Controls whether: - The Message Center appears in the Action bar. - The Notes icon and list of notes is available in Record detail pages. - Users can use the Message Center widget.
Record Type Auditable Fields	This field specifies the maximum number of fields that can be audited for each record type. The default number is 35, but you can change this value. **NOTE:** With each additional field audited, another record must be created in the database when that field is changed. When you audit too many fields at once, it can impact performance when saving the audited record. The maximum number of fields that can be audited for a record type is shown in the Audit Field Setup page for each record type, but the value cannot be changed in that page.
Audit Expiry (Days)	This field determines the length of time that the audit trail records for record types are retained in Oracle CRM On Demand before they are automatically purged. The retention period is specified in days, and the default value is 90. If your user role has the Administer Field Audit privilege, then you can change this value. The lowest number that you can enter is 1, and the highest is 366. A value of 0 (zero) specifies that the audit trail records are never purged. However, you cannot set the value to zero. If you want the audit trail records to be retained indefinitely, then you must contact Oracle CRM On Demand Customer Care and ask them to set this field to zero. **NOTE:** The audit trail for a record type can track the creation, deletion, and restoration of records, as well as updates to specified fields on existing records. For information about setting up the audit trail for record types, see Customizing the Audit Trail (on page 1306).

Field	Description

	The audit trail records for the following actions are never purged, regardless of the setting in the Audit Expiry (Days) field:
	- Updates to company details
	- Creation of new users
	- Updates to the following fields on the User record type:
	  - Always Send Critical Alerts
	  - Authentication Type
	  - Email
	  - External Identifier for Single Sign-On
	  - Reports To, or Reports To (Alias)
	  - Role
	  - Status
	  - User Sign In ID
	
	NOTE: The Audit Expiry (Days) field does not determine the length of time that user sign-in records and resource usage records are retained. For information about the length of time that such records are retained, see Reviewing Your Company's Resource Usage (on page 1175)and Reviewing Sign-In Activity for All Users (on page 1174).

Related Information Format	Select the format for related information sections on the record Detail pages. The related information sections can appear as lists or as tabs that users can click to view the lists. You can also specify a setting for the Related Information Format option for each role. Users whose role has the Personalize Related Information Display Format privilege can also set the Related Information Format option in their personal profile. If the Related Information Format field in a user's personal profile is blank, then the setting for the user's role is used; and if the Related Information Format field on the user's role is blank, then the setting for the company is used.
Global Search Method	Select which search method you want to make available to your users in the Search section in the Action bar and in the Lookup windows: - **Targeted Search.** A targeted search searches specified fields to find matches. In a targeted search, users can enter values in several fields. The search returns only those records where a match is found for each of the values the user entered. The search layouts that are assigned to user roles for the record types determine which fields users can search. Targeted search is enabled by default in Oracle CRM On Demand. For more information about targeted search, see About Targeted Search (on page 75). - **Keyword Search.** A keyword search searches default fields that are specific to each record type. In a keyword search, users enter a text string in a single text box. The search returns all records where the text string the user entered is found in any of

Field	Description
	the searched fields. For more information about keyword search, see About Keyword Search (on page 83).
Navigate Directly to Detail Page If Only One Record Is Returned	This picklist allows you to enable or disable the feature that opens a record returned by a search directly in the record Detail page, if it is the only record returned by the search. This setting is blank by default. The following options are available: - **Enabled.** If a search returns only one record, then the record opens directly in the record Detail page. - **Disabled.** The results of the search are always shown in a List page, even if the search returns only one record. Users can override this setting when they edit their personal profile. If the setting is blank in a user's profile, then the setting at company level is used, and if the setting is blank at company level as well, then the feature is disabled for the user. **NOTE:** This setting applies to searches that users perform directly in the Action bar, and to advanced searches of single record types from the Advanced link in the Action bar only. It does not apply to searches from the Advanced link in a list of related records, or to searches from the Advanced link in Lookup windows, or to searches of multiple record types.
Fiscal Year Start Month	This field displays the month in which your fiscal calendar begins. This field is initially set when your company is created and cannot be changed by the company administrator. This setting affects reports that measure revenue against your fiscal year. To update this field, contact Customer Care.
Fiscal Year Start Date	This field displays the date within the specified month in which your fiscal year begins. This field is initially set when your company is created and cannot be changed by the company administrator. This setting affects reports that measure revenue against your fiscal year. To update this field, contact Customer Care.
Fiscal Calendar Type	This field displays the type of fiscal year calendar you use. You can select from the following values: Calendar Quarters, 4-4-5, 5-4-4, Custom Fiscal Calendar. This setting affects time-based analyses, business plans, and forecasts. The company administrator cannot change this field. To update this field, contact Customer Care.

Field	Description
Product Probability Averaging Enabled	Determines how the opportunity probability is updated when the user clicks the Update Opportunity Totals button: - If selected, the opportunity probability is calculated based on the weighted average of probability for each of the linked products: Opportunity Probability = SUM(Product Expected Revenue)/ SUM(Product Revenue) - If deselected, the probability is not updated as part of the action. **NOTE:** The Update Opportunity Totals button is located on the Opportunity Detail page, in the title bar in the Products related information section.
Enable Save & Add Product	If this setting is selected and a user creates a new Opportunity record, the Save & Add Product button is displayed in the Opportunity page header instead of the Save button. If this setting is deselected and a user creates a new Opportunity record, the Save & Add Product button is not displayed in the Opportunity page header, only the Save button is available.
Enable Opportunity Revenue Split	Select this option to enable the splitting of opportunity revenue among team members. When this check box is selected, the Refresh Totals and Spread Split buttons are displayed on the Opportunity Team Edit Users page, allowing revenue to be split among team members. The Opportunity Revenue Forecast and My Opportunities page display opportunities where the user is a Team Member with a greater than 0 split revenue. When this check box is deselected, the Refresh Totals and Spread Split buttons are not displayed on the Opportunity Team Edit Users page. The Opportunity Revenue Forecast and My Opportunities page display opportunities where the user is an Opportunity Owner.

Field	Description
Head-up Display	If the head-up display functionality is turned on, and if the Support Head-up Display Settings check box is selected on your user's theme, then links to the related information sections of the page (such as linked records sections) are available in the head-up display at the bottom of your browser window. Users can also remove the head-up display completely from Detail pages, by turning off the functionality in their personal profiles. For more information on the Head-up Display, see Oracle CRM On Demand Page-by-Page Overview (on page 35). **NOTE:** If a user's theme supports the head-up functionality, then the head-up display can be turned on or off at company level, and by each individual user. Also, a user's personal setting overrides the company setting. However, you can remove the head-up display completely by deselecting the Support Head-up Display Settings check box on a user's theme.The colors in the head-up display are determined by the theme you are using. For more information about choosing a theme, see Setting Your Theme (on page 743).
Enable Shared Addresses	Select this option to turn on sharing of the top-level address records in account, contact, dealer, and partner records. If this option is deselected, then only unshared address functionality is available in account, contact, dealer, and partner records. For more information on shared addresses, see Addresses. **NOTE:** If shared addresses are turned on, then review the information in Considerations When Turning Off Shared Addresses (on page 1194) and complete the procedure in Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses (on page 1195) before you turn off shared addresses. Shared addresses are not compatible with prepackaged Oracle product integrations such as an Oracle Process Integration Pack (PIP). If you are using a PIP, such as Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite PIP, do not select the Enable Shared Addresses setting.
Validate Shared Addresses	Select this option to validate shared addresses in a company. If this option is selected, then users can select shared addresses to add to the account, contact, dealer, or partner records. Nonvalidated addresses are filtered from account, contact, dealer and partner records, and the New address button is disabled in these records. If Validate Shared Addresses is deselected, then all addresses are available on account, contact, dealer or partner records (that is, no filtering takes place and the New address button is enabled in these records for users with the necessary privileges). For more information on validating addresses, see Marking Shared Addresses as Validated (on page 346).

Field	Description
Enable Enhanced View for Tabs	Select this check box to enable enhanced functionality, for example, sorting and filtering in the related information sections on record Detail pages where the related information sections appear as tabs. For more information about the actions that users can perform when this check box is selected, see About the Enhanced View for Related Information Tabs (on page 73). The Enable Enhanced View for Tabs check box is deselected by default.
Enable Classic Theme Paging for Tabs	Select this check box to allow users to scroll through the related information tabs on record Detail pages one set of tabs at a time rather than scrolling through the tabs one at a time, which is the default behavior. This setting applies only for classic themes. The Enable Classic Theme Paging for Tabs check box is deselected by default.
Order Usage	Select how users work with orders and order items in Oracle CRM On Demand. If you select the CRM On Demand Order Management value, then users can use order management in Oracle CRM On Demand Life Sciences Edition. If you select the Ebiz PIP Integration value, then users can use the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution. Ebiz PIP Integration is the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution, and therefore this field is not available to Oracle CRM On Demand Order Management. For more information on Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite, contact Customer Care. Users require the Enable Order Access privilege in their role to use the order functionality for either of these purposes. For more information on choosing the order management type, see About EBIZ PIP Integration and Oracle CRM On Demand Order Management (on page 639).

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Record-Type Lists in Lookup Windows</td><td>Select how you can search for records in Lookup windows:

Enabled. For this setting, the following happens:

A set of predefined lists that users can use to restrict their searches is available in the record type List field in Lookup windows for top-level record types, where record type is the name of the type of record that the user is searching for.
The Show Context-Sensitive List as Lookup Window Default check box is available in the Search Layout Wizard. The check box enables you to specify that any available context-sensitive lists appear before the other lists in the record type List field in Lookup windows. The first list in the set of lists in the record type List field is active when the Lookup window opens.

Mixed: For this setting, the following happens:

The record type List field is available in the Lookup windows that display record type List fields, and the initial search for a record of a given record type is performed on all records of that record type that the user can access.

Disabled: For this setting, the following happens:

The record type List field is not available in any Lookup windows, and the initial search for a record of a given record type is performed on all records of that record type that the user can access.
NOTE: If you select Disabled in the Record-Type Lists in Lookup Windows menu on the company profile after you set up the search layouts, then the Show Context-Sensitive List as Lookup Window Default check box is no longer available in the Search Layout Wizard. Also, the context-sensitive lists are not available in Lookup windows, and the initial search for a record of a given record type in a Lookup window is performed on all records of that record type that the user can access, regardless of whether the Show Context-Sensitive Lists as Lookup Window Default option was previously selected. However, Oracle CRM On Demand stores the setting for the Show Context-Sensitive List as Lookup Window Default check box for each search layout. If you later select Enabled or Mixed in the Record-Type Lists in Lookup Windows menu on the company profile again, then the setting for the Show Context-Sensitive List as Lookup Window Default check box for each search layout is restored and becomes effective again.

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

Field	Description
Enable Personalization of Individual Dynamic Page Layouts	This check box is deselected by default and determines how users can personalize the layout of related information sections on Detail pages where dynamic layouts are used, as follows: - When the check box is deselected, a user can create only one personalized layout of the related information sections for a record type. After a user personalizes the layout of the related information sections on the Detail page for a record type, the user sees the same set of related information sections on the Detail page of all records of that type regardless of the value that is selected in the picklist field that determines the dynamic rendering of the page layout. - When the check box is selected, a user can create a personalized layout of the related information sections for each value in the picklist field that determines the dynamic rendering of the page layout. **NOTE:** To personalize related information layouts, users must have the Personalize Detail Page - Related Information privilege in their role. For information about what happens if you change the setting in this check box, see How Personalized Related Information Layouts Interact with Page Layouts for Roles (on page 1318). **NOTE:** The Enable Personalization of Individual Dynamic Page Layouts setting applies only to the personalization of related information layouts. It does not apply to the personalization of field layouts for record pages. Users who have the Personalize Detail Page - Fields privilege can personalize their field layouts for individual dynamic page layouts even if the Enable Personalization of Individual Dynamic Page Layouts check box is not selected. For more information about personalizing field layouts, see Personalizing Field Layouts (on page 754).
Enable Language Translation Support for Web Applets	Select this check box if you want to enable the functionality that allows you to enter translated names for custom Web applets and for the applets that display custom reports on record-type homepages and on My Homepage. For more information, see Translating Web Applet and Custom Report Names (on page 1291). The Enable Language Translation Support for Web Applets check box is deselected by default. **NOTE:** The Enable Language Translation Support for Web Applets check box applies only to custom Web applets and the applets that display custom reports on record-type homepages and on My Homepage. It does not enable or disable the functionality that allows you to enter translated names for other elements in Oracle CRM On Demand, such as field names, role names, access profile names, and so on.

Field	Description
Enable Language Translation Support for Workflow Cancel Save Message	Select this check box to enable the functionality that allows you to enter translated versions of the custom error messages that are returned to users or Web services if the condition on a workflow rule is not met and the Cancel Save check box is selected for the rule. For information about entering translated versions of the custom error messages, see Canceling Workflow Save Operations (on page 1525). The Enable Language Translation Support for Workflow Cancel Save Message check box is deselected by default. **NOTE:** If workflow rules with custom error messages already exist when you select this check box, then the custom messages for those rules continue to appear in the default company language and in the default font for all users, regardless of the user's language, until you enter translated versions of the message for the existing rules.
Exclude Vehicle/Asset Records from Portfolio Accounts	If this setting is selected, then vehicle and asset records are excluded from all Portfolio Account listings. Before Release 29, vehicle and asset records were included in Portfolio Account listings. From Release 29, if the check box is selected, only records with a value of Portfolio in the Asset Type field are included in listings. If the check box is deselected, vehicle and asset records are included in all Portfolio Account listings.This check box is deselected by default. From Release 33, if the check box is selected, then only records with a value of Portfolio in the Asset Type field are included in reports that use the Portfolio-related subject areas.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Enable Automatic Update of Opportunity Totals</td><td>The Enable Automatic Update of Opportunity Totals check box is deselected by default. The behavior of this setting is as follows:

If this check box is selected, then the revenue and expected revenue on an opportunity are updated automatically when any of the following events occur:
A product is added to the opportunity through any channel.
A product is removed from the opportunity through any channel.
The details of a product that is linked to the opportunity are updated through any channel.
If this check box is not selected, then the revenue and expected revenue on an opportunity are not updated automatically when a product is added to or removed from the opportunity, or the details of a product that is linked to the opportunity are updated. To update the revenue on the opportunity after any such change, a user must click the Update Opportunity Totals button in the title bar of the Opportunity Product Revenues section in the Opportunity Detail page.

NOTE: If the Enable Automatic Update of Opportunity Totals check box is selected on the company profile, then the Update Opportunity Totals button does not appear in the title bar of the Opportunity Product Revenues section in the Opportunity Detail page.</td></tr>
<tr><td>Allow Unicode Characters in Email Fields</td><td>If this check box is selected, then you can use most Unicode (UTF-8) characters in the address in the Email field on the Contact and Lead record types only, in both the local part of the address and the domain name.

You can update the Email field in the user interface by using any of the following utilities:
Import Assistant
Oracle Data Loader On Demand
Web services
Update Values action on a workflow
NOTE: For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses (on page 61).</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Freeze List Column Header</td><td>This picklist determines how users view column headers for lists and search results in Oracle CRM On Demand. You can select the following values:
On. When users scroll down a list of records, and the column header row reaches the top of the browser window, the column labels are always visible.
Off. When users scroll down a list of records and the column header row reaches the top of the browser window, the column labels are no longer visible.

This functionality can be turned on or off at company level and at user level. The setting at user level overrides the setting for the company.

The default value for this setting is Off.</td></tr>
<tr><td>Export Request Expiry (Days)</td><td>This field determines the length of time that export request records are retained in Oracle CRM On Demand before they are automatically purged. The retention period is specified in days. The default value is 60, but you can change this value. The minimum retention period that you can specify is one day. If you want the export request records to be retained indefinitely, then set the value to 0 (zero).

NOTE: Export request records are not included in the calculation of your company's record allotment usage.

The retention period applies to export requests that are submitted through List pages, as well as export requests that are submitted through the Data Export Assistant.</td></tr>
</table>

Field	Description
Export Request Attachment Expiry (Days)	This field specifies the number of days that the attachments containing the output from export requests are retained in Oracle CRM On Demand before they are automatically purged. The default value is 7, but you can change this value. The valid values are 1 through 366. The retention period applies to attachments for export requests that are submitted through List pages, as well as attachments for export requests that are submitted through the Data Export Assistant. **NOTE:** Users who have the Delete Export Request Attachments privilege in their role can manually delete an export request attachment before it is purged, regardless of the value that is set in this field. After a user deletes an export request attachment, the attachment cannot be retrieved. If you enter a value that is greater than 7 in this field, then the export request attachments that are retained are included in the calculation of the amount of storage used by your company, and after the file allotment limit is reached, export requests will fail. If the value in this field is less than or equal to 7, then the export request attachments are not included in the calculation of the amount of storage used by your company, and export requests will not fail as a result of the file allotment being reached. **NOTE:** After an export request is deleted, it is not possible to access the attachment for the request. Therefore, it is recommended that you do not enter a value in this field that is greater than the value in the Export Request Expiry (Days) field, unless that field is set to 0 (zero).
Email Expiry (Days)	This field determines the length of time that the emails sent by Oracle CRM On Demand are retained before they are automatically purged. The retention period is specified in days. The default value is 30, but you can change this value. The minimum retention period that you can specify is one day. If you want the emails to be retained indefinitely, then set the value to 0 (zero). **NOTE:** Sent emails are not included in the calculation of your company's record allotment usage.

Field	Description
Email Attachment Expiry (Days)	This field specifies the number of days that the attachments to emails sent by Oracle CRM On Demand are retained before they are automatically purged. The default is 7, but you can change this value. The valid values are 1 through 366. If you enter a value that is greater than 7 in this field, then the email attachments that are retained are included in the calculation of the amount of storage used by your company, and after the file allotment limit is reached, Send Email workflow actions for scheduled events for the Analytics record type will fail. If the value in this field is less than or equal to 7, then the email attachments are not included in the calculation of the amount of storage used by your company, and Send Email workflow actions for scheduled events for the Analytics record type will not fail as a result of the file allotment being reached. **NOTE:** After a sent email is deleted, it is not possible to access the attachment for the email. Therefore, it is recommended that you do not enter a value in this field that is greater than the value in the Email Expiry (Days) field, unless that field is set to 0 (zero).
Store Email in Lower Case	The Store Email in Lower Case check box is selected by default. The behavior of this setting is as follows: - If this check box is selected, then any uppercase characters in email addresses are stored in lowercase. - If this check box is deselected, then any uppercase characters in email addresses are stored in uppercase. **NOTE:** Lowercase characters in email addresses are always stored in lowercase. This setting applies to all email addresses that are added to Oracle CRM On Demand, regardless of the channel through which the addresses are added. **NOTE:** If your company saved email addresses in mixed case in the past, and if the Store Email in Lower Case check box is selected, then errors can occur when you attempt to use Web services requests or REST API requests on records such as user and contact records where the email addresses are in mixed case. If such issues arise, and if your company wants to store all email addresses in lowercase, then you must update the email addresses that are currently stored in mixed case and change them to lowercase. To edit the email addresses, you must first deselect the Store Email in Lower Case check box. After you finish editing the email addresses, select the Store Email in Lower Case check box again.
Enable HTML Formatting	The setting in this check box determines whether HTML formatting is supported in fields of the Note field type. For more information, see About the HTML Editor (on page 62).

Field	Description
Keep Disabled Picklist Value On Update	The setting in this check box determines the following: - Whether a disabled picklist value can remain in a field on a record when a user updates the field inline or edits the record through the user interface. - Whether the Import Assistant can update a multi-select picklist field with a list of values that includes one or more disabled values that are already selected in the field. For information about the behavior that this setting controls, see About the Keep Disabled Picklist Value on Update Setting (on page 1256).
Prevent Web Service Updates of Inactive Currencies	Select this check box if you want to prevent Web services from updating a currency field value to an inactive currency. By default, this check box is deselected, and Web services can update a currency field value to an inactive currency.
Enable Audit Trail Fields to Respect User Locale	Select this check box if you want numbers, currencies, phone numbers, times, and dates in audit trail records to be shown in the appropriate format for the current user's locale. By default, such fields are shown in the same format for all users, regardless of a user's locale.
Enforce Product Category-Product Relationship	Select this check box if you want to make sure that the relationship between a product and its product category is always correct. By default, this check box is deselected, and users can save a record on which the product and the product category are not related. If you select this check box, then for the following record types, users receive an error message if they try to save a record on which the product category and the product are not associated with each other: - Account Revenue - Accreditation - Certification - Contact Revenue - Course - Exam - Opportunity Product Revenue

Configuring Company Work Week and Calendar Settings

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

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

Field	Description
Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday	Select a check box for each business day in your calendar work week. You must select at least one check box.
Display Events in Calendar	When this setting is selected, Oracle CRM On Demand automatically creates an associated appointment record for every event record created. The users with access to the Event record type can view their event's associated appointments in the Oracle CRM On Demand calendar. Updates to the events or appointments are kept synchronized. For more information about event and appointment synchronization, see About Event and Appointment Synchronization (on page 228). If this setting is never selected, then only appointments that have not been automatically created when an event was created are displayed in the Calendar section and Oracle CRM On Demand does not automatically create an associated appointment for any new events. However, if your administrator selects this setting for a period of time and then chooses to deselect this setting, then any existing automatically-created appointments will remain. When an event is updated, Oracle CRM On Demand continues to synchronize with the event's associated appointment. If the event is deleted, then the appointment is also deleted. **NOTE:** If this setting is enabled, then an additional event appointment record is created in the database for each event record created. This impacts performance when importing events due to the additional records created. Additionally, if this setting is enabled, then an additional event team record is created in the database for each user added to the event appointment. This impacts performance when importing appointment users (when the import file has event appointments) due to the additional records created.
Calendar Week Starts On	This field displays the day that is shown by default as the first day of the week in the calendar views for all users and in the date selectors where users select values for date fields in Oracle CRM On Demand. By default, Sunday is selected. You can select a different start day for the week. Users can also override the company setting for the start day of the week by selecting a different day in their calendar settings.
Business Hours Start Time	Enter a time at which your business day starts. The time format can vary depending on your country's locale.
Business Hours End Time	Enter a time at which your business day ends. The time format can vary depending on your country's locale.

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

Configuring Lead Settings

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

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

Field	Description
Convert Only Editable Related Objects	If you select this check box, then users can convert leads to other record types such as accounts, contacts, deal registrations, or opportunities, even if the user performing the conversion does not have edit access to all activities and custom object records required for the conversion. However, only the activities and custom object records to which the user has edit access are linked to the converted lead record. For more information on the settings required for lead conversion, see Access Profile and Role Settings for Converting Leads (on page 255). If you do not select this check box, then the user performing the conversion must have edit access to all activities linked to the lead and all custom object records selected for the conversion. Otherwise, the lead conversion will not succeed. This is the default setting.
Enable Owner Full Name, Rating and Sales Person are Required to Qualify a Lead	If you select this check box, then the Owner Full Name, Rating, and Sales Person fields are required in the Lead record when qualifying the lead. This is the default setting. If you do not select this check box, then these fields are not required for qualifying a lead.
Auto-Update Sales Person Field When Associating Account on Lead Record	If you select this check box, then Oracle CRM On Demand automatically updates the Sales Person field in a lead when an account that is associated with the lead is updated, either through the user interface, the import tool, workflows, or through Web services. This is the default setting. If you do not select this check box, Oracle CRM On Demand does not update the Sales Person field.

Field	Description
	NOTE: If a user clicks the Convert button on a Lead Detail page to associate a lead to an existing account, then Oracle CRM On Demand does not update the Sales Person field.

Configuring Company Theme Settings

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

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

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

Configuring Company Data Visibility Settings

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

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

Field	Description
Manager Visibility Enabled	When a manager views a list of records that is set up to search the *All records I can see* record set, such as the All Accounts list, Oracle CRM On Demand displays the list of records as follows: - If the Manager Visibility Enabled option is selected, then the list includes the records to which the manager’s subordinates have access. - If the Manager Visibility Enabled option is not selected, then the list does not include the records to which the manager’s subordinates have access, unless the Can Read All Records setting on the manager’s role is selected for the relevant record type. When a manager selects the *All records I can see* option in an advanced search, Oracle CRM On Demand searches the set of records as follows:

Field	Description
	- If the Manager Visibility Enabled option is selected, then the set of records that Oracle CRM On Demand searches includes the records to which the manager's subordinates have access. - If the Manager Visibility Enabled option is not selected, then the set of records that Oracle CRM On Demand searches does not include the records to which the manager's subordinates have access, unless the Can Read All Records setting on the manager's role is selected for the relevant record type. A user's manager is specified in either the Reports To field or the Reports To (Alias) field on the User Detail page, depending on which of these fields is displayed on the page. **NOTE:** Deselecting the Manager Visibility Enabled option does not result in managers being unable to access the records that are owned by their subordinates. Managers always have access to the records that are owned by their subordinates, regardless of the setting of this option.
Enable Parent Team Inheritance for Contact	Select this check box to enable contact teams to automatically inherit account team members when contacts are related to accounts. This check box is deselected by default for new companies. **NOTE:** After you change the setting in this check box, users must sign out of Oracle CRM On Demand and then sign in again to see the new behavior of the team inheritance functionality. For more information about team inheritance, see About Access Propagation Through Team Inheritance (on page 1406).
Enable Parent Team Inheritance for Opportunity	Select this check box to enable opportunity teams to automatically inherit account team members when opportunities are related to accounts. This check box is deselected by default for new companies. **NOTE:** After you change the setting in this check box, users must sign out of Oracle CRM On Demand and then sign in again to see the new behavior of the team inheritance functionality. For more information about team inheritance, see About Access Propagation Through Team Inheritance (on page 1406).
Default Group Assignment	Select this option to allow group members to share ownership of accounts, activities, contacts, households, opportunities, and portfolios. For more information, see Group Management (on page 1458).
Enable Books	Controls whether the Book selector displays custom books. If this check box is not enabled, the Book selector displays only user books and books for delegates, if delegates exist. **CAUTION:** Do not select the Enable Books option until you have created your book hierarchy. You cannot deselect this option after it has been selected. However, you can make changes to your book hierarchy after the option has been selected.

Field	Description
Display Book Selector	Enables or disables the Book selector, which you can use to refine searches for records of a particular user, delegate, or custom books.
Enable Merge of Duplicate Record's Books	This setting applies only if your company uses the book functionality in Oracle CRM On Demand. For information about the book functionality, see Book Management (on page 1421). When users merge records, the books that are associated with the primary record are always retained, but any books that are associated only with the duplicate records are not automatically associated with the primary record. The Enable Merge of Duplicate Record’s Books check box determines whether the user who merges the records can choose to associate the books from the duplicate records with the primary record, as follows: - If the check box is selected, then Oracle CRM On Demand prompts the user to specify whether the books that are associated with the duplicate records are to be associated with the primary record. - If the check box is deselected, then the user cannot specify that the books that are associated with the duplicate records are to be associated with the primary record. The check box is deselected by default. For more information about merging duplicate records in Oracle CRM On Demand, see Merging Records (on page 151).
Display Parent Book Hierarchy in Book Selector	This setting applies only if your company uses the book functionality in Oracle CRM On Demand. For information about the book functionality, see Book Management (on page 1421). The Book Selector page allows users to view only their associated books and subbooks. However, by allowing users to view the entire book hierarchy, users have context to specific books within the company. The Display Parent Book Hierarchy in Book Selector check box determines how books and hierarchies are displayed in the Book Selector as follows: - If the check box is deselected, then the Book Selector displays only books and subbooks where the user is a member. - If the check box is selected, then the Book Selector displays the books and subbooks where the user is a member, and all upper nodes in the book hierarchy. If the Can Read All Records setting for books is selected for the user's role, then the user can expand and view all nodes in the book hierarchy. The names of the books of which the user is a member and its subbooks are displayed in black. The upper nodes of which the user is not a member are displayed in red. **NOTE:** The setting affects only the Book Selector in pages where a record search or filter is applied, for example, the Action Bar Search, Advanced Search, List Management, Lookup windows, Reports, and Dashboards.

Configuring Integration Settings

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

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

Field	Description
Integration Event Enabled	If you are a new customer, the integration event functionality is automatically enabled. However, if you are an existing customer, the Oracle CRM On Demand integration event functionality must be configured by Customer Care and by your company administrator. Contact Customer Care to request support for Integration Event Administration and to specify the maximum total size of the integration event queues you require.
Web Services R16 Compatibility Mode	Controls whether Web services requests containing the Username and Password tokens are processed as stateless requests or as stateful requests as in Oracle CRM On Demand Release 16 and earlier. This check box is deselected by default for all new companies.
Import Blank Values in Multi Select Picklists	This setting determines whether a multi-select picklist field that contains a value on a record can be updated to a null value when the record is updated through an import operation. By default, this check box and the corresponding check box in the Import Assistant are both deselected, and multi-select picklist fields cannot be updated to null values during an import operation. However, users can select the check box in the Import Assistant if they want to allow multi-select picklist fields to be updated to null values through an import operation. If you select this check box on the company profile, then the corresponding check box on the Import Assistant is also automatically selected, and multi-select picklist fields can be updated to null values through an import operation. Users can deselect the check box in the Import Assistant if they do not want to allow multi-select picklist fields to be updated with null values through an import operation.
Enable Workflow	If your company has been set up to allow workflow, this setting is displayed. This setting can be activated once you have created the workflow conditions you want to deploy.
Include Weblink URL in Export Files	This setting determines the default value of the Include Weblink URL in Export Files check box in the Export Assistant or in the Export List page. The behavior of this setting is as follows: ■ If this check box is selected, then the Include Weblink URL in Export Files check box is selected by default in the Export Assistant or on the Export List page. When performing an export, this value specifies that URLs are included in the exported CSV file. ■ If this check box is not selected, then the Include Weblink URL in Export Files check box is not selected by default in the Export Assistant or on the Export List page. When performing an export, this value specifies that URLs are excluded in the exported CSV file. **NOTE:** When performing each export, the user can choose to select or deselect the Include Weblink URL in Export Files check box.

Configuring Company Security Settings

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

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

Field	Description
Company Idle Timeout (minutes)	This is the time allowed in minutes before a user's session ends because of inactivity. If the value for this field is blank, the interactive session timeout setting is determined by the System Default Idle Timeout value. The default value for the system default idle timeout value is usually 60 minutes. You can view the current System Default Idle Timeout setting on the Company Profile page. This value is visible when you edit the Company Profile page. It is recommended that you enter a value between 10 minutes and 90 minutes. The Company Idle Timeout (minutes) setting can also determine the time that is allowed before a noninteractive session, such as a Web services session, ends due to inactivity, as follows: - If the Company Idle Timeout (minutes) field is set to 10 minutes or less, then the setting applies to noninteractive sessions as well as interactive sessions. - If the Company Idle Timeout (minutes) field is set to any value that is more than 10 minutes, then the setting does not determine the idle timeout interval for noninteractive sessions. In this case, the idle timeout interval for noninteractive sessions is 10 minutes by default. - If the Company Idle Timeout (minutes) field is left blank, then the setting does not determine the idle timeout interval for noninteractive sessions. In this case, the idle timeout interval for noninteractive sessions is 10 minutes by default, and the System Default Idle Timeout value determines the idle timeout interval for interactive sessions. **NOTE:** From Release 33, if any Analytics Answers interactions invoke a server call, then the idle timeout interval timer is reset.
Company Idle Timeout Warning (minutes)	The time in minutes before a warning message appears to the user, prior to the user's session expiring. If the user clicks OK on this warning message, then the idle timeout interval timer is reset. However, if the user does not click OK, then the user's session times out after the specified idle timeout interval. **NOTE:** This warning message is not displayed in Analytics Answers. The value for the Company Idle Timeout Warning (minutes) field must be between 1 and the value indicated in the Company Idle Timeout (minutes) field. If you enter 0 as a value, then a warning message is not displayed. **NOTE:** The page mask that appears when the warning message is displayed does not provide a security mechanism.

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

Field	Description
	a user who has signed in using SSO signs out and this setting is blank, a generic page is displayed with the message "You have been signed out."
IP Address Restrictions Enabled	See Restricting Use to IP Addresses (on page 1160).
Cross-Site Request Forgery Protection Enabled	Enables a feature that prevents cross-site request forgery attacks. When this check box is selected, users who create customized code that interacts with Oracle CRM On Demand might require a security token to be included as a hidden parameter in their code. For more information about cross-site request forgery protection, see About Cross-Site Request Forgery Protection (on page 1159). This check box is selected by default when your company is set up to use Oracle CRM On Demand, and you cannot change the setting.
Enable IFRAME embedding	For security reasons, this check box is deselected by default and must be selected only when required. By selecting this check box, you allow users to embed Oracle CRM On Demand pages in an iFRAME on another site's Web page. If users try to embed Oracle CRM On Demand in an iFRAME on another site's Web page, and this check box is deselected, the Oracle CRM On Demand page expands so that it becomes the parent page. You must select this setting if you want to use the Oracle CRM On Demand Reports widget. This setting does not affect other Oracle CRM On Demand widgets that you embed in desktop applications.
How to handle pages that may contain Cross Site Scripting (XSS)	Controls the behavior of the cross-site scripting (XSS) protection available in some Web browsers to prevent reflected XSS attacks. You use this setting to determine how your Web browser handles pages that contain XSS. The following values are possible: - **Block.** If XSS is detected by the Web browser, then the Web page is not displayed. This is the default and the recommended value. - **Correct.** If XSS is detected by the Web browser, then Oracle CRM On Demand blocks the attack by making the smallest modification possible to the returned Web page. - **Do Nothing.** This setting provides no XSS protection. The Web browser will not try to detect XSS, or will ignore any detection of XSS, in the Web page. It is recommended that you do not use this setting. - **Browser Default.** This setting uses the Web browser's default XSS protection level, which might be configurable, and the level of XSS protection might vary from one vendor to another.
Convert URL Text Values to Links	By selecting this check box, address fields and text field values with the field type of Text (Short) or Text (Long) that start with http:// or https:// are automatically converted to Web links. In addition, any URL field values on the Attachment Detail page that start with http:// or https:// are also automatically converted to Web links. For security reasons, this check box is deselected by default and must be selected only when required.

Configuring Analytics Visibility Settings

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

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

Field	Description
Reporting Subject Areas	Use this picklist to set the visibility for users who want to view real-time reports in Analytics. These reports provide real-time analyses of data. You can select one of the following values: - **Manager Visibility.** Allows users to view their own data, and data directly owned by their subordinates. (This is the default setting.) - **Team Visibility.** Allows users to view their own data, and data shared with them by their Account and Opportunity teams. This company-wide setting applies unless users set a value for the Reporting Subject Areas setting in their Personal Detail page. For more information on reports, see Analytics (on page 789), particularly the About Visibility to Records in Analytics (on page 807) topic. **NOTE:** If you want to restrict visibility to records in real-time reports in Analytics, then you must select a value in this field.
Historical Subject Areas	Use this picklist to set the visibility for users who want to view historical reports in Analytics. These reports provide historical or trend analyses, or contain more complex calculations than those found in real-time reports. You can select one of the following values: - **Manager Visibility.** Allows users to view their own data, and data directly owned by their subordinates. (This is the default setting.) - **Team Visibility.** Allows users to view their own data, and data shared with them by the Account and Opportunity teams. - **Full Visibility.** This setting combines the views of Manager and Team Visibility. This company-wide setting applies unless users set a value for the Historical Subject Areas setting in their personal details. For more information on reports, see Analytics (on page 789), particularly the About Visibility to Records in Analytics (on page 807) topic. **NOTE:** If you want to restrict visibility to records in historical reports in Analytics, then you must select a value in this field.
Role-Based Can Read All Records	Use this picklist to specify whether you want Analytics to use the Can Read All Records setting on a record-type basis, as defined on the Record Type Access page within the Role management wizard. If the Role-Based Can Read All Records setting is enabled through either the company profile or your user profile, and if the Can Read All Records visibility setting is selected by your administrator for your user role on a given record type, then you can view all records of that record type in Analytics. See About the Role-Based Can Read All Records Setting (see About the Role-Based Can Read All Records Setting on page 742) for guidance on when and how to enable the Role-Based Can Read all Records setting.

Field	Description
	If the Role-Based Can Read All Records setting is not enabled, then Analytics uses the visibility set on the Reporting Subject Areas and Historical Subject Areas fields.

Configuring Communications Settings

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

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

Field	Description
Send Email on User Profile Updates	This setting determines which Oracle CRM On Demand users receive alert emails after the Email, User ID, or External Identifier for Single Sign-On fields are updated. The following values are available: ▪ **All Users.** Emails are sent to all Oracle CRM On Demand users. This setting is the default, and it is the recommended setting. ▪ **All Active Users.** Emails are sent only to all active Oracle CRM On Demand users. ▪ **No Users.** Emails are not sent to any Oracle CRM On Demand users. This setting is recommended only in a nonproduction environment.

Configuring Additional Company Profile Settings

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

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

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

Configuring Geocoder Settings

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

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

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

Field	Description
	For more information on geocoding, see About the Geocoding of Address Information (on page 355).

Verifying License Statuses and Active Users

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

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

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

To verify your license status and active and inactive users

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Company Profile section, click the Company Profile link.
4. In the Additional Information section on the Company Profile page, verify the numbers of licensed, active, and inactive users.
   - If you have active users who no longer need access to the application, you can free up licenses by deactivating them. For more information on deactivating licenses, see Deactivating Users (on page 1384).
   - If you want to purchase more licenses, contact your Oracle CRM On Demand sales representative.

About Sign-in and Password Policies

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

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

Security Considerations

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

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

- Do you want to allow users to change their user IDs or email addresses?
- How long do you want a user's active session to last for?

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

Password Setting Changes

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

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

What Happens When Users Forget Their Password?

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

Defining Your Company's Password Controls

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

To define your company password controls

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

   The following table describes the settings.

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

Setting	Possible Values	Usage
Sign-in Policy Information		
Company Sign In ID	Text box	Is a unique identifier for your company. When creating new users this identifier will be the first portion of the User Sign In Id (Company Sign-in ID) for the user. When new users are created and the Default User ID Type is Company Sign-in ID, the Company Domain part of the

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

		active session reaches its maximum duration. When using Web services and the active session times out, the Web Services client must reauthenticate to continue using Web services.
Password Control Information		
Expire User Passwords In	30 days, 60 days, 90 days, 180 days, One Year, Never expires	The length of time that a user's password is valid. After this period has elapsed, the user is forced to change the password. **NOTE:** If the Expire User Passwords In setting on your role is blank, then the setting for the company is used.
Days Before Password Expiry Warning	This value can be blank, or it can be a number greater than 0 and less than the number of days specified by the option selected in the Expire User Passwords In field. If you select the One Year option in the Expire User Passwords In field, then the value that you enter in the Days Before Password Expiry Warning field can be a number between 1 and 364, or you can leave the field blank.	This setting indicates how many days prior to a user's password expiring Oracle CRM On Demand sends a notification email to the user. It is recommended that you enter a value of no less than 2, and you might want to specify a greater number of days to allow adequate time for the user to update the password. If you enter no value in this field, then no notification email is sent to the user. **NOTE:** If you select the Never expires option in the Expire User Passwords In field, then the Days Before Password Expiry Warning field is read-only.
Minimum Password Length	Number between 6 and 30	The minimum number of characters that can be used for a password.
Maximum Number of Password Changes	Number between 1 and 20	The maximum number of times that a user's password can be changed as specified in the Password Change Limit Window setting. If a user attempts to change a password more than

		the specified number of times, the change is not allowed. **NOTE:** Oracle CRM On Demand does not implement this password policy if your user authenticates using a Single Sign-On ID.
Password Change Limit Window	Number of days (from 1 to 7)	The period during which the Maximum Number of Password Changes setting applies.
Complexity Level of Passwords	3 or 4	The number of character classes that must be satisfied in the user passwords from the following four categories: - Uppercase characters (A...Z) - Lowercase characters (a...z) - Numeric characters (0, 1, 2...9) - Nonalphanumeric characters (!,$,#,%)
Enforce Password Policy On Logon	Check box	If the check box is selected, then a password policy check is enabled when users sign in to Oracle CRM On Demand. This policy check ensures that the user's password complies with the Minimum Password Length and Complexity Level of Passwords settings in Oracle CRM On Demand.

Number Of Last Passwords To Prevent User From Reusing	Number between 0 and 10	The number of previously used passwords that the user cannot reuse in Oracle CRM On Demand. The default value for new companies is 3. The default value for existing companies is 1 or 0 if the following conditions are met: - The New Password Must Be Different Than Your Old Password setting is selected. - The Number Of Last Passwords To Prevent User From Reusing setting is deselected.
Authentication Information		
Number Of Security Questions To Be Completed	Number between 0 and 8	This setting determines how many security questions and answers a user must set up. The user's questions and answers are stored for future use. **NOTE:** Users set up their security questions when they sign in to Oracle CRM On Demand for the first time. Users can also change their security questions at any time. For more information, see Setting Up Your Security Questions (on page 747). When users reset their password from the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page, they must answer a certain number of the security questions that they set up. **NOTE:** If a user forgets his password when this value is set to zero (0), then the user must request the administrator to reset his password. You can specify that users must set up a larger number of questions than the number they

		are required to answer when resetting a password. A random selection of the questions the user sets up is displayed to authenticate the user when resetting the password.
Number Of Security Questions To Be Answered	Number between 0 and 8	This setting determines the number of security questions that a user must answer when resetting a password from the Can't Access Your Account? link on the Oracle CRM On Demand sign-in page. When the user submits the request to reset the password, the user receives an email, shortly afterwards, with a link to a temporary page. On the temporary page, the user must answer the number of security questions specified in this setting before the password can be reset. The value in this field must be less than or equal to the value in the Number of Security Questions to be Completed field, because the user cannot be required to answer more questions than the user has set up.
Number Of Days Temporary Sign In Is Valid	Number of days (1 to 14)	This setting determines the number of days that a temporary sign-in password is valid. An email with temporary sign-in information is typically sent when a new user is added, or when the company administrator or Customer Care resets the user's password.
Number Of Temporary Password Sign In Attempts	Number of attempts (1 to 14)	The total number of sign-in attempts allowed using a temporary sign-in password. If this value is exceeded, the user's temporary sign in information becomes invalid, and the user must have the password reset again.

Additional Information		
Allow Users To Change User ID	Check box	If the check box is selected, users who edit their User Profile can change their User ID. If the feature is not enabled, only the company administrator can change the user IDs.
Allow Users To Change Email Address	Check box	If this check box is selected, then users who edit their user profile can change their email address. If this feature is not enabled, then only the company administrator can change the email addresses.
Concurrent Session Option	Allow with Notification, Allow without Notification, and Prevent and Terminate Existing	This setting allows you to manage how Oracle CRM On Demand handles concurrent sessions while using your login credentials. The option, Allow with Notification, allows you to engage in concurrent sessions. However, Oracle CRM On Demand notifies you that another session is in progress, using the same account details. Oracle CRM On Demand also provides notification to the user on the other session. The option, Allow without Notification, allows you to engage in concurrent sessions. However, Oracle CRM On Demand does not notify either user that the other session is in progress. The option, Prevent and Terminate Existing, closes the first and existing session, leaving the second and new session in progress. Users of both sessions are notified of the actions.

About Cross-Site Request Forgery Protection

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

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

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

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

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

Resetting All Passwords

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

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

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

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

To reset all passwords

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

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

Related Topics

See the following topics for related information:

- Resetting a User's Password (on page 1379)
- Setting Up Users (on page 1363)
- Defining Your Company's Password Controls (on page 1152)

Activating Languages

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

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

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

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

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

To activate languages

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

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

5. Save the record.

Restricting Use to IP Addresses

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

NOTE: You can also specify restrictions at role level, so that users who have a certain role are restricted to specific ranges of IP addresses. For more information, see About IP Address Restrictions for Roles (on page 1394).

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

To restrict use to IP addresses

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

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

5. Save the record.

Fiscal Calendar Administration

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

About Fiscal Calendars

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

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

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

Standard Fiscal Calendars

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

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

When using standard fiscal calendars, Oracle CRM On Demand automatically generates your fiscal periods up to the year 2040. You can view the settings for your standard fiscal calendar, but you cannot change them. However, you can change the naming format of your fiscal calendar, for more information see Updating the Fiscal Calendar Name (on page 1162). If you want to change your calendar definition, contact Customer Care. Customer Care populates your fiscal calendar with data and specifies your calendar type when your company is being set up.

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

To view a standard fiscal calendar definition

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

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

Custom Fiscal Calendars

Custom fiscal calendars are available in Oracle CRM On Demand to accommodate companies that do not use standard calendar months or a common fiscal calendar. Your company administrator defines custom fiscal calendars. You must create a custom fiscal calendar record for each year for which you want to create business plans, objectives, forecasts, or time-based analyses in Oracle CRM On Demand. For more information on defining custom fiscal calendars, see Defining a Custom Fiscal Calendar (on page 1162).

Updating the Fiscal Calendar Name

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

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

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

To update the fiscal calendar name

1. In the upper-right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.
4. On the Fiscal Calendar List page, click Update Fiscal Calendar Name.
5. Select one of the following:
   - **Start Year**. Fiscal calendar names and fiscal period names are suffixed with the start year for that fiscal year.
   - **End Year**. Fiscal calendar names and fiscal period names are suffixed with the end year for that fiscal year.
6. Click Save.

Defining a Custom Fiscal Calendar

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

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

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

1. Contact Customer Care to enable the use of custom fiscal calendars for your company.
2. Define your company's fiscal calendars.
3. Verify that the custom fiscal calendar is active within your company.

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

Custom Fiscal Calendars and Forecasts

When using custom fiscal calendars, your company's custom fiscal calendar definition is used in the generation of forecasts. Your company administrator must define custom fiscal calendar records prior to activating forecasts. Since forecasts can span more than one quarter in duration, it is possible that a forecast could include data from multiple fiscal years. Therefore, to ensure that sufficient data is available for the forecast series to be generated, a custom fiscal calendar must be created for each year your company wants to generate forecasts. In addition, your company administrator must update your forecast definition before the new custom fiscal calendar definition can be used in forecasts. If the forecast definition is not refreshed prior to the next forecast date, your forecasts are not generated. For more information on updating forecast definitions, see Updating the Forecast Definition (on page 1580).

To define a new custom fiscal calendar

1. In the upper-right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.
4. On the Fiscal Calendar List page, click New Fiscal Calendar.
5. From the menu, select the fiscal year that you require.

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

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

6. Enter the following information:
   a. **Description.** Add any extra information about the custom fiscal definition. This field has a limit of 250 characters.
   b. **Fiscal Quarter 1.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
   c. **Fiscal Quarter 2.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
   d. **Fiscal Quarter 3.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
   e. **Fiscal Quarter 4.** Click the calendar icons to indicate the start dates for each of the fiscal months in this quarter.
   f. **Additional information.** Click the calendar icon to indicate the start of the next fiscal year.

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

7. Click Save.

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

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

To view a fiscal calendar's detail

1. In the upper-right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Fiscal Calendar Administration section, click the Fiscal Calendar Definition link.
4. On the Fiscal Calendar List page, click the name of the fiscal year for which you want to view the fiscal periods.

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

NOTE: If you are moving from a standard fiscal calendar to a custom fiscal calendar, your previous fiscal year records appear as read-only in the Fiscal Calendar List page and all future, fiscal-year records that Oracle CRM On Demand generates are deleted. For more information on standard fiscal calendars, see About Fiscal Calendars (on page 1161).

To edit your company's fiscal calendar

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

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

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

Managing Your Company's Lists of Periods

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

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

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

Note: Users can only select lists of periods in the Period lookup windows if the Record-Type Lists in Lookup Windows menu on the company profile is set to Enabled. For more information about this menu and what it controls, see Searching for Records in Lookup Windows (on page 101) and Setting Up Your Company Profile and Global Defaults (on page 1123).

Managing the Lists of Periods

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

To manage the lists of periods

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Fiscal Calendar Administration section, click the Fiscal Period Administration link.
4. In the Period List page, select options from the Menu button as follows:
   - **Record Count.** Count the number of periods in the period list, see Counting Records in Lists (on page 143).
   - **Refine List.** Refine the period list by specific criteria and save the list under a new name, see Creating and Refining Lists (on page 130).
   - **Save List.** Save a list. When you click Save List, this brings you directly to a page with Save options.
   - **Show List Filter**. Show the key information for a list in the drop down menu, see View List Page (on page 141). You can also access this page by clicking View in the Manage Lists page.
   - **Manage Lists.** Manage the period lists, see Manage Lists Page (on page 140).
   - **Create New List.** Create a new filtered period list, see Creating and Refining Lists (on page 130).

Defining the Period Search Layout

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

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

To define the period search layout

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

   For more information on creating search layouts, see Managing Search Layouts (on page 1296).

Defining the Lists of Periods Available for Each Role

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

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

To define the lists of periods available for each role

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

   For more information on managing list access and the display order for each role, see Managing List Access and List Order (on page 1302).

Currency Definition

Defining currencies for your company includes:

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

For information about currency definition, see Managing Currencies (on page 1165).

Managing Currencies

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

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

CAUTION: Be sure to set up exchange rates before your users enter transactions for all currencies you activate.

You can enter multiple exchange rates for any active currency. Each entry consists of the Exchange Date and an Exchange Rate for that date. In determining which exchange rate to use for a particular transaction, the application follows these rules:

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

In this case, a company has the following currencies:

- The default currency for a company is the U.S. dollar (USD).

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

How Exchange Rates Are Applied to Forecast Rollups

In this case, the following rules apply:

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

For example, if exchange rates are entered for only 5/15/2004 and 8/15/2004, then this occurs:

- For transactions prior to 5/15/2004, the 5/15/2004 rate is used.
- For transactions between 5/15/2004 and 8/14/2004, the 5/15/2004 rate is used.
- For transactions on or after 8/15/2004, the 8/15/2004 rate is used.

How Exchange Rates Are Applied to Reports

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

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

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

For example, if exchange rates are defined for 5/10/2004, 5/20/2004, and 8/14/2004, then:

- The May 2004 rate will be the value set for 5/20/2004 (the latest rate set for May).
- The August 2004 rate will be the value set for 8/14/2004 (the only rate set for August).
- April 2004 and prior months will be assigned the rate for 5/20/2004. There are two dates for the month of May.
- June and July 2004 will be assigned the August 2004 rate (closest future month).
- September 2004 and future months will be assigned the August 2004 rate (no future month, so first previous month is used).

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

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

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

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

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

NOTE: If the currency code on a record is blank, then Analytics assumes that the values in the currency fields on the record are in the company's default currency. In any analysis that includes the record, the values that are returned in the currency fields are the corresponding values in the currency for the analysis, calculated using the appropriate exchange rate. The currency for an analysis is the currency that is selected on the user profile of the user who is viewing the analysis. If no currency is selected on the user's profile, then the default currency for the company is used. However, if a currency prompt is set up on the analysis, then the user can select a different currency.

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

Before you begin. To perform the procedures for managing currencies, your role must include the Manage Company - Define Currencies privilege. Also, to understand the effect of currency settings, read About Profile Settings for Users (on page 741).

To activate currencies

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

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

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

8. Save the record.

To define the exchange rates

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Currency Definition section, click the Exchange Rates link.

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

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

4. To add a new exchange rate for an active currency:
   a. Click the Exchange History link for the Currency row for which you want to add a rate.

      On the Exchange Rate page, click New.

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

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

   Example: 1 Euro = 1.3 US dollars.

   Assuming your company's currency is set to US Dollars (USD), you would enter these values:

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

5. Click Save.

To view a history of exchange rates

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Currency Definition section, click the Exchange Rates link.

   On the Exchange Rate Edit page, the latest exchange rates appear for different currencies.
4. To see the history of exchange rates for a single currency, click the Exchange Rate History link.

   A history of the exchange rates appears.

Division Setup

Your company can use the Division record type to organize your users into groupings to meet your business needs. For example, you can use divisions to organize users on a geographical basis. You can associate a user with one or more divisions. The first division that is associated with a user record is automatically specified as the primary division for the user, but you can change the primary division for the user. You can associate divisions with picklist value groups, so that for users in certain divisions, the values that appear in the picklists in certain fields on records are limited to subsets of the values that are defined for the fields. Each division can be associated with one picklist value group only. For more information about picklist value groups, see About Picklist Value Groups (on page 1329).

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

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

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

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

NOTE: By default, the All Divisions list is available in the Lookup window for the Division field, and a user can select any division. You can set up lists of divisions and specify which lists are available in the Lookup window for the Division field for user roles. For more information, see Managing List Access and List Order (on page 1302).

When a user changes the division on a record, the picklist value group for the record automatically changes to the picklist value group for the new division. For more information about the behavior of the Division and Picklist Value

Group fields when records are created and updated, see About Divisions and Picklist Value Groups on Records (on page 1173) and About Picklist Fields, Picklist Value Groups, and Divisions (on page 58).

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

- Considerations When Setting Up Divisions (on page 1169)
- Process of Setting Up Divisions (on page 1169)
- Creating Divisions (on page 1170)
- Associating Picklist Value Groups with Divisions (on page 1170)
- Associating Users with Divisions (on page 1171)

Related Topics

See the following topics for related information:

- Record Types That Support Picklist Value Groups and Divisions (on page 1331)
- About Merging Divisions and Deleting Divisions (on page 1172)
- About Divisions and Picklist Value Groups on Records (on page 1173)
- Changing the Primary Division for a User (on page 1380)

Considerations When Setting Up Divisions

When setting up divisions, consider the following:

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

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

Related Topics

See the following topics for related information:

- Process of Setting Up Divisions (on page 1169)
- Creating Divisions (on page 1170)
- Associating Picklist Value Groups with Divisions (on page 1170)
- Associating Users with Divisions (on page 1171)
- About Divisions and Picklist Value Groups on Records (on page 1173)
- Changing the Primary Division for a User (on page 1380)

Process of Setting Up Divisions

Before you begin. Review the information in Considerations When Setting Up Divisions (on page 1169).

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

1 Determine the following:
   - The divisions that you want to set up.
   - The picklist value group that you want to associate with each division, if any. Each division can be associated with only one picklist value group, but a picklist value group can be associated with multiple divisions.
   - The users that you want to associate with each division.
2 Create your divisions.

   For more information, see Creating Divisions (on page 1170).
3 (Optional) Associate picklist value groups with the divisions.

   For more information, see Associating Picklist Value Groups with Divisions (on page 1170).
4 Associate users with the divisions.

   For more information, see Associating Users with Divisions (on page 1171).
5 (Optional) Add the Division field to the page layouts for the record types on which you want to use divisions.

   For more information, see Customizing Static Page Layouts (on page 1267) and Specifying Dynamic Page Layouts (on page 1314).

Creating Divisions

To create a division, complete the steps in the following procedure. This task is a step in Process of Setting Up Divisions (on page 1169).

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

To create a division

1 Click the Admin global link.
2 In the Company Administration section, click Company Administration.
3 In the Division Setup section, click Division Setup.
4 In the Division List page, click New.
5 Enter a name and a description for the division, and then save your changes.

Related Topics

See the following topics for related information:

- Division Setup (on page 1168)
- Considerations When Setting Up Divisions (on page 1169)
- Process of Setting Up Divisions (on page 1169)
- Associating Picklist Value Groups with Divisions (on page 1170)
- Associating Users with Divisions (on page 1171)

Associating Picklist Value Groups with Divisions

You can associate only one picklist value group with each division. However, each picklist value group can control the values for one or more picklist fields on one or more record types, and each picklist value group can be associated with multiple divisions. For more information about picklist value groups, see About Picklist Value Groups (on page 1329).

To associate a picklist value group with a division, complete the steps in the following procedure. This task is a step in Process of Setting Up Divisions (on page 1169).

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

To associate a picklist value group with a division

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

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

Associating Users with Divisions

You can associate a user with one or more divisions. The first division that is associated with a user is automatically designated as the user's primary division, but you can change the primary division on a user's record. For more information, see Changing the Primary Division for a User (on page 1380).

You can associate users with divisions in two ways:

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

To associate users with a division, complete the steps in the following procedure. This task is a step in Process of Setting Up Divisions (on page 1169).

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

To associate users with a division

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

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

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

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

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

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

To associate divisions with a user

1 Click the Admin global link.
2 In the User Management and Access Controls section, click the User Management and Access Controls link.
3 In the User and Group Management section, click the User Management link.
4 In the User List, click the last name of the user with whom you want to associate divisions.
5 On the User Detail page, do one of the following:
   - If you want to associate a single division only as the primary division for the user, then in the Primary Division field, click the Lookup icon, and select the division that you want to be the primary division for the user.
   - If you want to associate multiple divisions with the user, then scroll to the Divisions related information section and click Add. You can add up to 10 divisions at one time. To associate more divisions with the user, click Save and Add Divisions.

About Merging Divisions and Deleting Divisions

You can delete a division even if the division is associated with users and with records. You can also merge up to five divisions into one at one time. When you merge two or more divisions, one division is retained and the other divisions are deleted.

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

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

After you delete a division directly, the following happens:

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

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

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

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

For step-by-step instructions for merging records, see Merging Records (on page 151).

About Divisions and Picklist Value Groups on Records

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

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

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

Division Field Can Be Updated	Picklist Value Group Field Can Be Updated	When a User Creates a Record the Following Behavior Applies	When a User Updates a Record the Following Behavior Applies
		value in the Picklist Value Group field on the record.	
No	No	- The Division field is populated with the primary division for the user who creates the record. The user cannot change the value in the Division field on the record. - The Picklist Value Group field is populated with the picklist value group for the division. The user cannot change the value in the Picklist Value Group field on the record.	The user cannot change the value in the Division field or the Picklist Value Group field.

Related Topics

See the following topics for related information:

- Division Setup (on page 1168)
- Considerations When Setting Up Divisions (on page 1169)
- Process of Setting Up Divisions (on page 1169)
- Creating Divisions (on page 1170)
- Associating Picklist Value Groups with Divisions (on page 1170)
- Associating Users with Divisions (on page 1171)
- Changing the Primary Division for a User (on page 1380)
- About Picklist Value Groups (on page 1329)
- Considerations When Setting Up Picklist Value Groups (on page 1330)
- Process of Setting Up Picklist Value Groups (on page 1330)
- Creating Picklist Value Groups (on page 1331)
- Mapping Picklist Values to Picklist Value Groups (on page 1257)

Company Audit

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

- Reviewing Sign-In Activity for All Users (on page 1174)
- Reviewing Your Company's Resource Usage (on page 1175)
- Reviewing Audit Trail Changes with the Master Audit Trail (on page 1176)
- Reviewing the Audit Trail for Administration Configuration Changes (on page 1177)
- Reviewing Your Company's Pending and Sent Emails (on page 1178)
- Reviewing All Export Requests for Your Company (on page 1181)

Reviewing Sign-In Activity for All Users

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

NOTE: Every night, Oracle CRM On Demand permanently deletes user sign-in records that are more than 90 days old. The user adoption history data is stored in the data warehouse to support the historical trend analysis of user adoption metrics in Oracle CRM On Demand analytics, but the data is not retained when a full extract, transform, and load (ETL) of data is performed during an upgrade of Oracle CRM On Demand to a new release, or when company data is migrated from one Oracle CRM On Demand environment to another Oracle CRM On Demand environment. For information about the Usage Tracking Analysis analytic subject area, see Usage Tracking Analysis Historical Analytics Subject Area (on page 895).

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

To review sign-in activity for all users

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

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

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

4. On the Sign In Audit title bar, select one of the following lists from the menu:
   - **All Sign In Audit.** Your default setting for viewing sign-in activity. This displays all sign-in audit data and is sorted by sign-in time.
   - **All Users Currently Signed In.** All users that are currently signed into Oracle CRM On Demand. This is sorted by sign-in time.

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

To manage sign-in activity lists

- On the Sign In Audit title bar, click the Menu button to perform the following actions :
  - **Export List.** Export the Sign-in Activity list to save on your computer, see Exporting Records in Lists (on page 143).
  - **Record Count.** Count the records in the Sign-in Activity list, see Counting Records in Lists (on page 143).
  - **Refine List.** Refine the Sign-in Activity filtered list, see Creating and Refining Lists (on page 130).
  - **Manage Lists.** Manage the Sign-in Activity Lists, see Manage Lists Page (on page 140).
  - **Create New List.** Create a new filtered Sign-in Activity list, see Creating and Refining Lists (on page 130).
  - **Save List.** Save the Sign-in Activity list, this brings you directly to a page with Save options.

Related Topics

See the following topic for related information:

- Reviewing Sign-In Activity for a User (on page 1380)

Reviewing Your Company's Resource Usage

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

- Reset Password
- Forget Password
- Answer Security Questions

- Change SSO Identifier
- Change to User ID
- Change to Email address
- Set Password
- Initial Password
- Offline

NOTE: Once every month, Oracle CRM On Demand permanently deletes resource usage records that are more than 90 days old. However, records are not purged when a user is created, or when the following fields are modified: Email, External Identifier for Single Sign-On, Role, Status, User Sign In ID.

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

To review your company's resource usage

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

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

To manage lists of resource usage records

- In the title bar of the Audit Trail page, click Menu, and then select the option for the task that you want to perform, as follows:
  - **Export List.** Export the list to a file, see Exporting Records in Lists (on page 143).
  - **Record Count.** Count the records in the list, see Counting Records in Lists (on page 143).
  - **Refine List.** Refine the list, see Creating and Refining Lists (on page 130). For example, you can change the list filter, select different fields to display, or change the sort order for the list.
  - **Save List.** Save the list. Selecting this option opens a page where you can select options for saving the list.
  - **Show List Filter.** View the filter that is currently defined for the list.
  - **Create New List.** Create a new filtered list, see Creating and Refining Lists (on page 130).
  - **Manage Lists.** View details of the list, or change the order in which the list appears in the picklist of lists on the List page, see Manage Lists Page (on page 140).

Reviewing Audit Trail Changes with the Master Audit Trail

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

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

To review audit trail changes with the Master Audit Trail

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

The Master Audit Trail displays the following values:

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

  NOTE: This value is displayed only when this information is available.

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

For more information about the audit trail, see Customizing the Audit Trail (on page 1306).

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

To manage lists of audit trail records

- In the title bar of the Master Audit Trail page, click Menu, and then select the option for the task that you want to perform, as follows:
  - **Export List.** Export the list to a file, see Exporting Records in Lists (on page 143).
  - **Record Count.** Count the records in the list, see Counting Records in Lists (on page 143).
  - **Refine List.** Refine the list, see Creating and Refining Lists (on page 130). For example, you can change the list filter, select different fields to display, or change the sort order for the list.
  - **Save List.** Save the list. Selecting this option opens a page where you can select options for saving the list.
  - **Show List Filter.** View the filter that is currently defined for the list.
  - **Create New List.** Create a new filtered list, see Creating and Refining Lists (on page 130).
  - **Manage Lists.** View details of the list, or change the order in which the list appears in the picklist of lists on the List page, see Manage Lists Page (on page 140).

Reviewing the Audit Trail for Administration Configuration Changes

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

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

To review the audit trail for administration configuration changes

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

The Admin Configuration Audit table displays the following values:

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

  NOTE: This value is displayed only when this information is available.

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

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

To manage lists of administration configuration changes

- In the title bar of the Admin Configuration Audit page, click Menu, and then select the option for the task that you want to perform, as follows:
  - **Export List.** Export the list to a file, see Exporting Records in Lists (on page 143).
  - **Record Count.** Count the records in the list, see Counting Records in Lists (on page 143).
  - **Refine List.** Refine the list, see Creating and Refining Lists (on page 130). For example, you can change the list filter, select different fields to display, or change the sort order for the list.
  - **Save List.** Save the list. Selecting this option opens a page where you can select options for saving the list.
  - **Show List Filter.** View the filter that is currently defined for the list.
  - **Create New List.** Create a new filtered list, see Creating and Refining Lists (on page 130).
  - **Manage Lists.** View details of the list, or change the order in which the list appears in the picklist of lists on the List page, see Manage Lists Page (on page 140).

Reviewing Your Company's Pending and Sent Emails

The Email Monitor page displays the following information:

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

About the Retention Period for Sent Emails and Email Attachments

In the standard application, Oracle CRM On Demand retains sent emails and their attachments for a certain period, as follows:

- The email is retained for 30 days, and is then purged.
- The email attachment is retained for 7 days, and is then purged.

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

- Email Expiry (Days)
- Email Attachment Expiry (Days)

For information about updating these fields, see Configuring Company Settings (on page 1124).

Emails that are sent when users import records, and emails that are sent when a scheduled event for analytics is executed, can have files attached to them. If the size of a file that is to be attached to an outbound email is not greater than 2 MB, then Oracle CRM On Demand attaches the file to the email. If the size of the file is greater than 2 MB, then Oracle CRM On Demand zips the file. If the size of the zipped file is not greater than 2 MB, then the zipped file is attached to the email. Otherwise, the file is not attached to the email.

For emails that are sent when users import records, the log file is the first attachment, and the map file is the second attachment. The map file is attached to the email provided that the combined size of the attachments is not greater than 2 MB. If the combined size of the attachments is greater than 2 MB, then Oracle CRM On Demand zips the map file and attaches it, provided that the combined size of the attachments is not greater than 2 MB. Otherwise, the map file is not attached to the email.

You can access the unzipped files, as well as the emails themselves, through the email monitor, regardless of whether or not the files were attached and sent with the emails.

Before you begin. To perform this procedure, your role must include the Access Master Audit Trail and Admin Configuration Audit privilege. If your user role does not include this privilege, then you cannot view the pending and sent emails for your entire company. However, you can view the emails that were sent or are waiting to be sent by Oracle CRM On Demand to you, as well as the emails that were sent or are waiting to be sent by Oracle CRM On Demand on your behalf, in your personal email monitor. For more information, see Accessing Your Pending and Sent Emails (on page 764).

The following procedure describes how to view your company's pending and sent emails.

To review pending and sent emails from Oracle CRM On Demand

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

   The Outbox and Sent Items sections display the following values:

   - **Type.** This column displays one of the following values:
     - **Customer.** Emails that are sent by Oracle CRM On Demand on behalf of users to other users or to customers.
     - **Operations.** Emails that are sent by Oracle CRM On Demand to Oracle CRM On Demand Customer Care.
     - **Service.** Emails that are sent by Oracle CRM On Demand to users.
   - **Sub-Type.** This column displays a value that indicates the type of operation from which the email originated. The sub-type is one of the following:
     - **Administration.** Emails that are sent to Oracle CRM On Demand Customer Care.
     - **Assignment Manager – Lead.** Emails that are sent to users when the assignment manager assigns a lead to a user.
     - **Assignment Manager – SR.** Emails that are sent to users when the assignment manager assigns a service request to a user.

    - **Batch Operations.** Emails that are sent to users when they perform actions such as deleting records using the Batch Delete feature, or assigning books to records using the Batch Assign Books feature.
    - **Export.** Emails that are sent to users when they export records.
    - **Forecast.** Emails that are sent in connection with forecasts.
    - **Fund Request.** Emails that are sent to users when fund requests are submitted.
    - **Import.** Emails that are sent to users when they import records.
    - **Integration Events.** Emails that are sent to users in connection with integration events and integration event queues.
    - **Partner Relationship.** (Specific to Oracle CRM On Demand Partner Relationship Management Edition) Emails that are sent to users when they are set up as users within a partner organization.
    - **Service Allotments.** Emails that are sent to users in connection with service allotments and license allotments.
    - **Trial Account.** Emails that are sent to users in connection with trial accounts for Oracle CRM On Demand.
    - **User Management.** Emails that are sent to users when they are set up in Oracle CRM On Demand, and emails sent to users in connection with certain changes to their user account.
    - **Workflow.** Emails that are sent to users by workflow actions.
  - **Status.** This column displays one of the following values:
    - **Queued.** The email request has not been processed yet.
    - **In Progress.** The email is being processed. Oracle CRM On Demand attempts to send an email three times. If on the third attempt the email fails to send, the status changes to Error.
    - **Sent.** The email has been successfully sent.
    - **Suppressed.** The email was not sent, because Oracle CRM On Demand does not send emails to the specified address.
    - **Error.** The email request did not complete because an error occurred.
  - **From.** The email address of the person or company who sent the email.
  - **Sent.** The date and timestamp the email was sent.
  - **To.** The email addresses of all the recipients to whom the email was sent.
  - **Initiated By.** The user sign-in ID of the user who initiated the email.
  - **Subject.** The subject of the email.
  - **Workflow Id.** If the email originated from a workflow action, then this column shows the ID of the workflow action. You can drill down to view the details of the workflow action.

4. If the sent email that you want to review is not displayed, then click Show Full List to open the Email List page, where you can search for the email.
5. If you want to delete a sent email, then click the Delete link for that email.

   NOTE: When you delete a sent email, any attachment to the email is also deleted.

6. To download an attachment for a sent email, do the following:
   a. In the Email Monitor or Email List page, click the Subject link for the email.
   b. In the Email Detail page, in the Email Attachments related information section, click the link in the Attachment field for the attachment you want to download.

      TIP: You can also download the first attachment for an email directly in the Email Monitor and Email List page, by clicking the Download link for the email record.

7 To delete a single attachment for a sent email, do the following:
   a In the Email Monitor or Email List page, click the Subject link for the email.
   b In the Email Detail page, in the Email Attachments related information section, click the Delete link for the attachment.

The following procedure describes how to work with lists of sent emails.

To work with lists of sent emails

1. In the Email Monitor page, in the Sent Items section, click Show Full List.
2. In the title bar of the Email List page, click Menu, and then select the option for the task that you want to perform, as follows:
   - **Export List.** Export the list to a file, see Exporting Records in Lists (on page 143).
   - **Record Count.** Count the records in the list, see Counting Records in Lists (on page 143).
   - **Refine List.** Refine the list, see Creating and Refining Lists (on page 130). For example, you can change the list filter, select different fields to display, or change the sort order for the list.
   - **Save List.** Save the list. Selecting this option opens a page where you can select options for saving the list.
   - **Show List Filter.** View the filter that is currently defined for the list.
   - **Create New List.** Create a new filtered list, see Creating and Refining Lists (on page 130).
   - **Manage Lists.** View details of the list, or change the order in which the list appears in the picklist of lists on the List page, see Manage Lists Page (on page 140).

For more information about the audit trail, see Customizing the Audit Trail (on page 1306).

Reviewing All Export Requests for Your Company

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

About the Retention Period for Export Requests and Export Request Attachments

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

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

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

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

- Export Request Expiry (Days)
- Export Request Attachment Expiry (Days)

For information about updating these fields, see Configuring Company Settings (on page 1124).

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

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

To review all export requests for your company

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

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

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

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

Export Record Information	Description
Type	The type of request, either Personal or Company.
Export Type	The type of export: - **Full**. A full export of your company's data. - **Partial.** A partial export of your company's data. - **List.** An export request made from a List page.
Record Type	The record types. For partial requests that include child records, the child record is indicated in the format *Parent*:*Child*, for example: Account:Contact.
Status	The status, for example: In Progress or Completed.
Client Name	The name of the client application.
Requested For	The user for whom the request was submitted.
Requested By	The user who submitted the request. An administrator can create a personal extract request for a user through Web services.
Submitted	The time and date when the export request was submitted.
Completed	The time and date when the export request was finished.
# Exported	The number of records that were exported.

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

To review the details of an export request

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

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

For information about downloading and deleting export request attachments, that is, the ZIP files that contain the output from the export requests, see Downloading and Deleting Export Request Attachments (on page 764).

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

Managing Lists of Export Requests

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

To manage lists of export requests

- In the title bar of the Master Export Request Queue page, click Menu, and then select the option for the task that you want to perform, as follows:
  - **Export List.** Export the list to a file, see Exporting Records in Lists (on page 143).
  - **Record Count.** Count the records in the list, see Counting Records in Lists (on page 143).
  - **Refine List.** Refine the list, see Creating and Refining Lists (on page 130). For example, you can change the list filter, select different fields to display, or change the sort order for the list.
  - **Save List.** Save the list. Selecting this option opens a page where you can select options for saving the list.
  - **Show List Filter.** View the filter that is currently defined for the list.
  - **Create New List.** Create a new filtered list, see Creating and Refining Lists (on page 130).
  - **Manage Lists.** View details of the list, or change the order in which the list appears in the picklist of lists on the List page, see Manage Lists Page (on page 140).

Alert Management

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

- Reviewing Your Alerts (on page 42)
- Publishing Company-Wide Alerts (on page 1183)
- Working with Lists (on page 125)
- Alert Fields (on page 1185)

Publishing Company-Wide Alerts

You can use alerts to broadcast company-wide information, such as meeting notices and policy changes, to all users. You can also configure the alerts so that they are broadcast only to users who have a certain role. The alerts appear on the user's My Homepage.

You can also configure an alert to display information in a separate pop-up window that appears whenever a user logs in to Oracle CRM On Demand, or in a scrolling text bar at the bottom of each page in Oracle CRM On Demand, or in both of these locations.

An alert window shows the title and description of the alert. The scrolling text bar shows only the title of the alert, but users can view the alert description by hovering their pointer over the alert title. A user can dismiss an alert so that it no longer appears in an alert window or in the scrolling text bar for that user, but the alert continues to be available to the user through the user's My Homepage.

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

You can link files or URLs to alerts. For example, when creating a meeting notice alert, you can add a link to a Web page with directions to the meeting location.

In general, users can review only the alerts that are displayed for all users, and the alerts that are configured to be displayed for their own role. However, if your role includes the Manage Company privilege, then you can review all alerts, including the alerts that are restricted to certain roles.

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

To create or update company-wide alerts

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

   The Alerts page appears with a list of company alerts.
4. On the Alerts page, do one of the following:
   - Click the New button.
   - Click the title of the alert you want to edit, and then click the Edit button.
5. On the New Alert or Alert Edit page, complete the required information.
6. (Optional) If you want the alert to appear in a separate pop-up window when the relevant users sign in, as well as appearing in the Alerts section of My Homepage, then select the Display Popup Window on Sign In check box.
7. (Optional) If you want the alert to appear in a scrolling text bar at the bottom of the page for the relevant users, then select the Scrolling Text Bar check box.

   NOTE: The background color and the text color for the scrolling text bar can be configured for each theme. For information about configuring themes, see Creating New Themes (on page 1348).
8. Save the alert.

To attach a file to an alert

1. Click the alert title on the Alerts list page to open the alert details.
2. In the Attachments related information section of the Alert Information page, click the Add Attachment button, and enter the information.
3. On the Attachment Edit page, click Save.

To attach a URL to an alert

1. Click the alert title on the Alerts list page to open the alert details.
2. In the Attachments related information section of the Alert Information page, click the Add URL button, and enter the information.

3 On the Attachment Edit page, click Save.

To assign an alert to specific roles

1 Click the alert title on the Alerts list page to open the alert details.

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

2 In the Associated Roles related information section of the Alert Information page, click the Add button.
3 In the Search for a Role dialog, search for the appropriate role, and click Select.
4 When you are finished adding roles, click Save.

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

Related Topics

- Viewing Alert Acknowledgements (on page 1185)

Viewing Alert Acknowledgements

If the Display Popup Window on Sign In check box is selected on an alert record, then the alert appears in a pop-up window when the relevant users sign in. If the Scrolling Text Bar check box is selected on an alert record, then the alert appears in a scrolling text bar at the bottom of the page in Oracle CRM On Demand for the relevant users.

A user can dismiss an alert and acknowledge that they read the alert by selecting the check box labeled "I have read this, never show again" and then clicking OK. The alert will not appear again in a pop-up window or in the scrolling text bar for that user, but the alert continues to be available through the Alerts section of My Homepage until the alert expires.

If an alert is configured to appear in a pop-up window, or in the scrolling text bar, or in both of these locations, then you can view a list of the users who acknowledged that they read the alert.

To view the acknowledgements for an alert

1 In the upper right corner of any page, click the Admin global link.
2 In the Company Administration section, click the Company Administration link.
3 In the Alert Management section, click the Company Alerts link.
4 Click the title of the alert.
5 In the Alerts page, in the Acknowledged By Users related information section, click Show Full List.

Alert Fields

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

Field	Description
Title	Title of the alert as it will appear on My Homepage.
Priority	Priority of the alert, which is indicated by the icon next to it on My Homepage.
Display Popup Window on Sign In	If this check box is selected, then the alert text appears in a separate pop-up window when users sign in.

Field	Description
Additional Information URL	URL or filename and directory path associated with the alert. **NOTE:** You cannot edit this field inline in the alert details. To edit this field, you must open the Alert Edit page.
Alert Description	Text as it will appear in the alert.
Post Date	Date you want the alert to begin being broadcast across My Homepage.
Expiration Date	Date you want the alert to end being broadcast across My Homepage.
Displayed Hyperlink	The hyperlink text for the URL or file path that you entered in the Additional Information URL field in the alert. For example, if you entered a URL for a Web page that provides directions to a meeting in the Additional Information URL field, such as "http://company.site/doc_2389.html", then you might type "Directions to meeting" for the link text.
Scrolling Text Bar	If this check box is selected, then the alert text appears in a scrolling text bar at the bottom of each page in Oracle CRM On Demand.

TIP: You can create filtered lists to limit the type of alert records displayed at one time. For instructions, see Working with Lists (on page 125).

Related Topics

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

- Publishing Company-Wide Alerts (on page 1183)

Service Allotment Administration

Administering service allotments includes:

- Viewing Service Allotment Usage for Your Company (on page 1188)
- Viewing Historical Service Allotment Usage (on page 1189)
- Setting Alerts for Service Allotments (on page 1190)
- Viewing File and Record Utilization Information (on page 1190)

About Service Allotments

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

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

In the Allotment Usage List page, you can track your company's usage against service allotments over time. You can view, daily, weekly, or monthly usage, although this view varies with the allotment type. You can export the allotment data and allotment usage data for a company, using the Export Assistant. For information about using the Export Assistant, see Exporting Your Data (on page 1833).

Allotments That Are Updated Continuously in a 24-Hour Period

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

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

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

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

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

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

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

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

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

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

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

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

Oracle CRM On Demand updates the current usage for record and file allotments one time in every 24 hour period. In addition, when a record is deleted or restored in batch, or a new record is created through an import operation, Oracle CRM On Demand updates the current usage for the parent record types when the operation completes. The current usage is shown on the Current Usage field on the Service Allotment Detail page.

Real Time Updated Allotments

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

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

What Happens When Allotments Are Fully Used?

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

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

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

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

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

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

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

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

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

Viewing Service Allotment Usage for Your Company

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

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

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

- The user who last modified the allotment data

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

On the Allotment Usage List page, you can see the historical usage data about an allotment. For more information, see Viewing Historical Service Allotment Usage (on page 1189).

You can click Edit on the Service Allotment List page and then set an alert for an allotment. For more information, see Setting Alerts for Service Allotments (on page 1190).

To view your company's service allotment usage

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

Viewing Historical Service Allotment Usage

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

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

To do this	Follow these steps
Create a new list of allotment usages	On the title bar, click Menu, and select Create New List. Complete the relevant steps described in Creating and Refining Lists (on page 130).
Export the list	On the title bar, click Menu, and select Export List. Complete the steps described in Exporting Records in Lists (on page 143).
Manage allotment usages lists	On the title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in Manage Lists Page (on page 140).
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Refine the search criteria for the list	On the title bar, click Menu, and select Refine List. Complete the relevant steps described in Creating and Refining Lists (on page 130).
Show the key information and filter information for the list	On the title bar, click Menu, and select Show List Filter. Complete the steps described in View List Page (on page 141).
Sort the allotment usages in the list	Click the column header to sort the list according to that column, for example, click Start Time to sort the list according to the start time.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records that you want to see at one time.

Setting Alerts for Service Allotments

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

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

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

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

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

To set an alert for a service allotment

1. In the upper right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Service Allotment Administration section, click the Service Allotment Administration link.
4. In the Service Allotment List page, click Edit.
5. In the Service Allotment Edit page, complete the following fields:
   - **Alert Recipient**. Enter the email addresses of the users who will receive a warning email.
   - **Alert Threshold**. Enter the percentage of the allotment value at which the alert email will be sent.
   - **Alert Enabled**. Select this check box to enable the sending of alert emails.

Viewing File and Record Utilization Information

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

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

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

The following procedure describes how to view file utilization information.

To view file utilization information

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

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

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

Column Name	Description
Record Name	The name of the record type as it appears in the user interface. If your company customized the name of the record type, the customized record type name appears in this column. **NOTE:** If no files were attached to the records of a given record type for your company when the snapshot was taken, then the record type is not listed.
Number of Files	The number of files that were attached to the records of the listed record type for your company in Oracle CRM On Demand when the snapshot was taken.
File Allotment Used (MB)	The amount, in megabytes, of file storage used by your company in Oracle CRM On Demand to store file attachments for records of the listed record type when the snapshot was taken.
Date	The date and time of the snapshot.

The following procedure describes how to view record utilization information.

To view record utilization information

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

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

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

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

TIP: For information about using the menu options on the File Utilization List page and the Record Utilization List page, see Working with Lists (on page 125).

Address Administration

Address administration includes turning the address-sharing functionality on or off (using the Enable Shared Addresses setting in the company profile), enabling address validation (using the Validate Shared Addresses setting in the company profile), converting unshared addresses to shared addresses, and other tasks. For more information about address administration, see the following topics:

- Converting Unshared Addresses to Shared Addresses (on page 1192)
- Considerations When Turning Off Shared Addresses (on page 1194)
- Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses (on page 1195)
- Setting the Address Type for Unshared Addresses Using Edit Rel (on page 1196)
- Access Profile and Role Settings for Addresses (on page 1196)

Related Topics

- Addresses
- Setting Up Your Company Profile and Global Defaults (on page 1123)

Converting Unshared Addresses to Shared Addresses

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

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

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

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

To convert unshared addresses to shared addresses

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

   The list includes the following items:

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

  - Addresses
- All dealer data sections including:
  - Dealer
  - Dealer Addresses
- All partner data sections including:
  - Partner
  - Partner Addresses
- All address data

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

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

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

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

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

- Address Fields: Import Preparation (on page 1673)
- Account Fields: Import Preparation (on page 1661)
- Contact Fields: Import Preparation (on page 1700)
- Dealer Fields: Import Preparation
- Partner Fields: Import Preparation (on page 1780)

4 Import the address record data:

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

   b Allow the import to complete.

Importing the shared Address top-level record data is a prerequisite for importing account, contact, dealer, and partner record data. For information on importing data, see Importing Your Data (on page 1827).

5 Import the account record data:

   a Choose the option to create associated records.

   b Allow the import to complete.

This import creates the accounts and associates the shared addresses with the accounts. For information on importing data, see Importing Your Data (on page 1827).

6 Import the contact record data:

   a Choose the option to create the associated records.

   b Allow the import to complete.

This import creates the contacts and associates the shared addresses with the contacts. For information on importing data, see Importing Your Data (on page 1827).

7 Import the dealer record data:

   a Choose the option to create the associated records.

   b Allow the import to complete.

   This import creates the dealers and associates the shared addresses with the dealers. For information on importing data, see Importing Your Data (on page 1827).

8 Import the partner record data:

   a Choose the option to create the associated records.

   b Allow the import to complete.

   This import creates the partners and associates the shared addresses with the partners. For information on importing data, see Importing Your Data (on page 1827).

9 Confirm that the data has been imported correctly.

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

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

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

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

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

   NOTE: The Validation Date in an address record must be set to mark the address as validated. For more information, see Marking Shared Addresses as Validated (on page 346).

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

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

Considerations When Turning Off Shared Addresses

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

NOTE: Before turning off shared addresses you must remove access to address records for end users at your company, remove the Manage Addresses privilege from their user roles, and reset page layouts as required. For information on the procedure to remove this access and privilege, see Updating User Access and the Manage Addresses Privilege Before Turning Off Shared Addresses (on page 1195).

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

- **The company administrator has access to the customization pages.** The company administrator who has the Manage Addresses privilege continues to have access to the Oracle CRM On Demand customization pages and can continue to work with the address layouts, field management, and so on.

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

For information about turning off shared addresses, see the information on the Enable Shared Addresses setting in Setting Up Your Company Profile and Global Defaults (on page 1123).

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

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

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

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

To update user access profiles before turning off shared addresses

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

For more information about specifying access level types by using the Access Profile Wizard, see Specifying Access Levels for Primary Record Types (on page 1418). For more information about specifying privileges for a user's role by using the Role Management Wizard, see Role Management (on page 1389).

Setting the Address Type for Unshared Addresses Using Edit Rel

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

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

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

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

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

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

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

Access Profile and Role Settings for Addresses

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

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

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

Privileges and Settings That Control Access to Shared Address Functions

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

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

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

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

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

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

Task	Enable Shared Addresses Setting	Manage Addresses Privilege	Minimum Required Shared Address Rights	Validate Shared Addresses Privilege
Updating the Account Addresses, Contact Addresses, Dealer Addresses, or Partner Addresses sections in the corresponding records	Yes	No	Read	No

Application Customization

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

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

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

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

The Application Customization page has two sections:

- **Record Type Setup**. Contains links for each of the top-level record types. When you click a link, you are taken to a record-type-specific customization page. Depending on your company setup, industry-specific record types might not be visible within Oracle CRM On Demand. Also, industry-specific records might require customization according to your company's specific needs. For more information on the tasks that you can perform from the individual application customization pages, see Record Type Application Customization Page (on page 1199).
- **Application Setup**. Contains links to various customization functions that are not specific to a record type. Click a topic to see step-by-step instructions for the procedures available from the Application Setup section:
  - Displaying External Web Pages, Reports, and Dashboards in Tabs (on page 1324)
  - Creating Picklist Value Groups (on page 1331)
  - Creating and Managing Action Bar and Global Header Layouts (on page 1338)
  - Creating Global Web Applets (on page 1333)
  - Uploading Client Side Extensions (on page 1335)
  - Managing Custom HTML Head Additions (on page 1337)
  - Creating and Managing Action Bar and Global Header Layouts (on page 1338)
  - Customizing My Homepage for Your Company (on page 1340)
  - Enabling Custom Reports in My Homepage (on page 1340)
  - Renaming Record Types (on page 1343) and Adding Record Types (on page 1346)
  - Changing the Icon for a Record Type (on page 1347)
  - Customizing REST Integration Tags (on page 1348)
  - Creating New Themes (on page 1348)
  - Uploading and Managing Custom Icon Sets (on page 1344)
  - Uploading and Managing Custom Global Header Icons (on page 1345)

- Customizing Previous Ownership for Shared Records (see Customizing Previous Ownership for Shared Records on page 1355)

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

Before you begin:

- To perform the application customization procedures, your role must include the Customize Application privilege.
- Make sure you understand your business needs:
  - Talk with your business owners to understand their business processes and needs for the application.
  - Determine the fields, display names, values for picklists, and other custom fields required to support their needs.
  - Determine how the fields should be laid out on the interface and what fields must be marked as required.
  - Use the Field Setup and Page Layout templates, available in the Tools and Templates area of the Training and Support Center, to help you document your application customization requirements.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (on page 1334).

Record Type Application Customization Page

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

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

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

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

Section	Tasks	Additional Privilege Required
Field Management	Renaming fields, creating custom fields, managing picklist values, specifying default values for a field, setting up field validation, and selecting whether a field can be copied or not. For more information about these tasks, see: About Field Management (on page 1201) About Custom Fields (on page 1208) Creating and Editing Fields (on page 1219) Administering the Copy Enabled Setting (see Administering the Copy Enabled Setting on page 1232)	None

Section	Tasks	Additional Privilege Required
	Managing Field Labels (on page 1250) Using Indexed Custom Fields (on page 1251) Changing Picklist Values (on page 1254) Mapping Picklist Values to Picklist Value Groups (on page 1257) Reverting Settings to Defaults (on page 1254)	
	Advanced defining of default fields and field validation	Advanced Field Management
Page Layout Management	Creating and managing static page layouts. For more information about these tasks, see: Customizing Static Page Layouts (on page 1267) Customizing Related Item Layouts (on page 1258) Renaming Field Section Titles (on page 1276) Creating and customizing page layouts that can be used to create new records, see: Customizing Page Layouts for Creating New Records (on page 1274) Creating and managing Web applets that can be used on Detail page layouts; see: Creating Web Applets for Record Types (on page 1279) For information about advanced page layout management, see Specifying Dynamic Page Layouts (on page 1314).	None
Cascading Picklists	Defining and managing cascading picklists. For more information about these tasks, see: Defining Cascading Picklists (on page 1292)	None
Search and List Layout Management	Specifying targeted search fields and managing layouts for search results. Also, managing the behavior of the Lookup Windows and enabling smart associations.	None

Section	Tasks	Additional Privilege Required
	For more information about these tasks, see: Managing Search Layouts (on page 1296)	
List Access and Order	Managing default list access and the display order for each role. For more information about these tasks, see: Managing List Access and List Order (on page 1302)	None
Homepage Layout Management	Creating and managing Homepage layouts and specifying custom reports to be displayed on the Homepages. For more information about these tasks, see: Creating Record Homepage Layouts (on page 1305) Creating Homepage Custom Reports (on page 1302)	Customize Application – Manage Homepage Customization
Field Audit Setup	Customizing the field audit trail for your company. For more information about these tasks, see: Customizing the Audit Trail (on page 1306)	Administer Field Audit This feature is available only for certain record types.
Dynamic Layout Management	Creating and managing dynamic page layouts. For more information about these tasks, see: Specifying Dynamic Page Layouts (on page 1314)	Customize Application - Manage Dynamic Layouts

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

- Account Field Setup
- Account Contact Field Setup
- Account Partner Field Setup
- Account Relationship Field Setup
- Account Team Field Setup

About Field Management

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

- Creating and Editing Fields (on page 1219)
- Managing Field Labels (on page 1250)
- Changing Picklist Values (on page 1254)

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

About Copying Fields

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

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

The following restrictions apply when using the copy function:

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

You can copy fields by using the Copy button in record detail pages in Oracle CRM On Demand. You can enable this setting by using the Copy Enabled check box in the Field Management page of the Application Customization section of Oracle CRM On Demand. For more information on specifying which fields can be copied in Oracle CRM On Demand, see Administering the Copy Enabled Setting (see Administering the Copy Enabled Setting on page 1232).

Required Fields

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

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

The fields specified as required in the Field Edit page are required fields for all users, regardless of their role. If you need to make a field required only for a specific role, you can do so by editing the appropriate page layout for fields that are not already required fields. For more information, about editing page layouts, see Customizing Static Page Layouts (on page 1267).

Conditionally Required Fields

You can configure a field so that it is conditionally required, that is, the field is not required by default, but it becomes required when a defined condition is met. For more information, see About Conditionally Required Fields (on page 1217).

Read-Only Fields

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

- **Fields from external sources.** If your company tracks, for example, the credit rating of an account in an external system, it is likely that you want the credit rating to be updated regularly through a nightly import, but only want the field to be read-only in the UI.

- **Moving an existing field to a custom indexed field**. If you want to use one of the index custom fields for an existing custom field, you can specify that users can have read-only access only to the old field while you move data to the new index field. This field definition avoids data becoming out of sync.

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

Custom Field Validation Rules

You can use Oracle On Demand Expression Builder (Expression Builder) to create expressions for custom field validation rules. You can click the *fx* icon next to the Field Validation field to open the Expression Builder window in which you can enter an expression. For information about the syntax you can use for expressions, see Expression Builder (on page 1886).

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

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

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

  NOTE: For the business process where you want the Reason Won/Lost field to be required in certain circumstances only, you can alternatively set up the Reason Won/Lost field as a conditionally required field. For more information, see About Conditionally Required Fields (on page 1217).

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

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

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

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

Field validation expressions assume that the first parameter is the field name itself. If, for example, you are putting a simple field validation expression on an Amount field to specify that the value must be greater than 1000, it is sufficient to enter >1000. You do not need to enter [<Amount>]>1000. For more information on more complicated expressions, see About Expressions (on page 1890).

Restrictions on Specifying Field Validation Rules

You cannot specify field validation rules for these types of fields:

- System fields
- Internal calculated fields

- RowID and ID fields

  NOTE: Remember that Row_ID is an internal system field. Depending on the operation transitions, for example, during record creation, it is not always guaranteed to remain static. It can differ to ExternalSystemID or the IntegrationID.

- Associated fields
- Multi-select picklist fields
- Fields with User Property set to exclude them. These fields are set on an exception basis to prevent breaking the existing business logic in the application code.
- Web links
- Concatenated fields
- The following attachment fields:
  - Attachment
  - Attachment: File Name
  - Attachment: Size (In Bytes)

About Defining Default Field Values

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

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

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

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

There are two types of default values for fields:

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

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

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

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

You cannot set default values for these types of fields:

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

  NOTE: Remember that Row_ID is an internal system field. Depending on the operation transitions, for example, during record creation, it is not always guaranteed to remain static. It can differ to ExternalSystemID or the IntegrationID.

- Associated fields
- Multi-select picklist fields
- Fields with User Property set to exclude them. These fields are set on an exception basis to prevent breaking the existing business logic in the application code
- Web links
- Concatenated fields
- Check boxes (Post Default values)
- The following attachment fields:
  - Attachment
  - Attachment: File Name
  - Attachment: Size (In Bytes)

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

Field Type	Valid Default Values
Check box	Y if the checkbox should be checked and the Boolean value is true. N if the checkbox should be unchecked and the Boolean value is false. Blank represents an undefined value for a checkbox even though it appears unchecked **Note:** You cannot select Post Default for a check box field.
Currency	A valid numeric value up to 15 digits.
Date	Today + *number*, where *number* represents a specific number of days. The default date is calculated as today's date plus the number entered. For example, if today is 1 January 2008, and you enter Today + 7, the default value is set to 8 January 2008.
Date/Time	As for the Date field type, but in addition the time when the new record is opened is also shown.
Integer	A valid numeric value between -2147483648 and 2147483647.
Multi-select picklist	You cannot define a default value for a multi-select picklist.
Note	A text value up to 16350 characters.
Number	A valid numeric value between -2147483648 and 2147483647.

Field Type	Valid Default Values
Percent	A valid numeric value between -2147483648 and 2147483647.
Phone	A valid telephone number.
Picklist	The picklist value selected will be the default value for the field.
Text (Long)	A text value up to 255 characters.
Text (Short)	A text value up to 40 characters for custom fields and most preconfigured fields. However, for some preconfigured fields you can enter more than 40 characters. For example, the Account record type can have a name longer than 40 characters, therefore the length of the value for the Default field is not restricted to 40 characters.
Text (Short-Maskable)	A text value up to 40 characters in which some of the data is hidden from view from some users. For example, if a maskable field contains the value 4558785236, then users see XXXX5236. A user role must include the View Masked Data privilege to see the data in the maskable field. For more information, see About Maskable Fields (on page 60).
Web link	A valid URL. Expressions and validation is not allowed. A default value can be set through the Web Link edit page. The Display Text field can contain up to 250 characters. The URL field can contain up to 8000 characters. Browsers have different maximum URL lengths. If you specify a URL that is too long, it may not work as intended. The URL length changes if you are using parameter substitution.

NOTE: If you create an expression to set a default value, the result of the expression must not exceed the maximum number of characters allowed in the field. In addition, any string or numeric literal passed to a function in Expression Builder must not exceed 75 characters. For more information about using Expression Builder, see Expression Builder (on page 1886).

In addition:

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

  `Status (Task) = 'Not Started'`

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

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

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

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

You can also create complex expressions for default field values. You can enter an expression directly in the Default Value field, or click the *fx* icon to open the Expression Builder window, where you can enter an expression. For information about the syntax you can use for expressions, see Expression Builder (on page 1886).

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

About Field Setup and Page Layouts for Record Ownership Modes

Starting with Release 20, Oracle CRM On Demand provides three modes of record ownership for most of the record types that support books: user mode, book mode, and mixed mode. For existing companies that were created in Release 19 or earlier releases of Oracle CRM On Demand, user mode is the default record ownership mode for the record types that support the three modes of record ownership except for the Service Request record type, which is configured in mixed mode by default. For new companies, mixed mode is the default record ownership mode for the record types that support the three modes of record ownership. For more information about record ownership modes, see About Record Ownership Modes (on page 1428).

The record ownership mode for a record type is determined by the configuration of the Owner field and the Book field on the record type, and the page layouts for the record type must reflect the record ownership mode. The following table shows the configuration of the Owner field and the Book field for each of the record ownership modes. For information about setting up fields, see Creating and Editing Fields (on page 1219).

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

The following table shows the page layout information for each of the record ownership modes. For information about customizing page layouts, see Customizing Static Page Layouts (on page 1267) and Specifying Dynamic Page Layouts (on page 1314).

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

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

About Custom Fields

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

Custom fields:

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

  NOTE: For performance reasons, some custom fields cannot be used to sort lists. Web links and concatenated fields cannot be used in assignment rules, reports, and targeted search. Maskable fields cannot be used in assignment rules, reports, or in expressions in Expression Builder. For more information on using custom fields in reports, see About Limitations in Analytics (on page 817).

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

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

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

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

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

You can create a maximum of 3 custom Note fields for each of the Contact, Service Request, and Opportunity record types, and a maximum of 10 Note fields for each of the Custom Object 01 through 40 record types. You can also create maskable fields for the Account, Contact, Portfolio, Financial Account, Household, and Custom Object 01 through 40 record types. You can create a maximum of 5 maskable fields for each of these record types. For more information, see About Maskable Fields (on page 60).

NOTE: Some record types support custom related information fields. Custom related information fields that you create are counted towards the total number of fields of the relevant field type for the record type. For example, if you create a custom related information field of the Integer field type in the Custom Object 01 record type, then that field is one of the 35 fields of the Integer field type that you are allowed to create for the Custom Object 01 record type. For information about custom related information fields and how to create them, see About Custom Related Information Fields (on page 1226) and Creating Custom Related Information Fields (on page 1227).

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

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Activity	35	25	25	35	35	10
Campaign	35	25	25	35	35	0
Solution	35	25	25	35	35	0
Event	35	25	25	35	35	0
Household	35	25	25	35	35	0
Funds	35	25	25	35	35	0
Portfolio	35	25	25	35	35	0
Vehicle	35	25	25	35	35	0
Service Request	35	25	25	35	35	10
Service Request Team	0	0	0	0	0	0
Program	35	35	25	35	35	0
Custom Object 01	35	25	25	35	35	10
Custom Object 02	35	25	25	35	35	10
Custom Object 03	35	25	25	35	35	0
Dealer	35	25	25	35	35	10
Product	35	25	25	35	35	0
Asset	35	25	25	35	35	0
Fund Request	35	25	25	35	35	0
MDF Request	35	25	25	35	35	0
Partner	70	50	60	50	70	10
Revenue	35	25	25	35	35	0
SP Request	35	25	25	35	35	0

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

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link Plus Concatenated Field
Account	33	30	20	100	30	70	100
Account Contact	63	0	20	100	30	60	100
Account Event	0	0	0	0	0	0	20
Account Partner	0	0	0	0	0	0	20
Account Team	0	0	0	0	0	0	20
Business Plan Team	0	0	0	0	0	0	20

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link Plus Concatenated Field
Contact	33	30	20	100	30	70	100
Contact Team	0	0	0	0	0	0	20
Lead	33	30	20	100	30	70	100
Lead Event	0	0	0	0	0	0	20
Lead Team	0	0	0	0	0	0	20
Opportunity	33	30	20	100	30	70	100
Opportunity Event	0	0	0	0	0	0	20
Opportunity Partner	0	0	0	0	0	0	20
Activity	33	30	20	100	30	45	100
Campaign	35	30	20	100	30	70	100
Solution	33	30	20	100	30	46	100
Event	33	30	20	100	30	70	100
Household	35	30	20	100	30	70	100
Funds	33	30	10	100	30	45	100
MDF Request	35	30	20	100	30	60	100
Portfolio	33	30	20	100	30	70	100
Vehicle	35	30	20	100	30	60	100
Service Request	33	30	20	100	30	45	100
Service Request Team	0	0	0	0	0	0	20
SP Request	35	30	20	100	30	60	100
Program	35	30	20	100	30	60	100
Custom Object 01	35	30	20	100	30	60	100

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link Plus Concatenated Field
Custom Object 02	35	30	20	100	30	60	100
Custom Object 03	35	30	20	100	30	60	100
Dealer	35	30	20	100	30	60	100
Product	33	30	10	100	30	45	100
Asset	33	30	20	100	30	70	100
Fund Request	33	30	20	100	30	70	100
Partner	68	60	30	200	60	105	100
Revenue	33	30	20	100	30	45	100
User	35	30	20	100	30	60	100
Deal Registration	35	30	20	100	30	60	100
Deal Registration Revenue Products	35	30	20	100	30	60	100
Course	35	30	20	100	30	60	100
Exam	35	30	20	100	30	60	100
Certification	35	30	20	100	30	60	100
Accreditation	35	30	20	100	30	60	100
Custom Objects 04 and higher	35	30	20	100	30	60	100
Industry-specific record types other than those listed in this table	35	30	20	100	30	60	100
Contact Relationship	35	30	20	100	30	60	100
Invitee	35	30	20	100	30	60	98

In addition to the fields provided above, the following table shows the additional optimized fields that are available for the following record types in Oracle CRM On Demand. For more information on optimized fields, see Creating and Editing Fields (on page 1219).

Record Type	Check Box	Currency	Date	Date/Time	Integer	Multiselect Picklist
Account	5	25	25	0	25	0
Account Event	20	10	20	20	20	0
Account Partner	20	10	20	20	20	0
Account Team	35	25	25	25	35	0
Activity	5	25	25	0	25	0
Assessment	5	5	5	0	5	0
Business Plan Team	35	25	25	25	35	0
Campaign	5	5	5	0	5	0
Contact	5	25	25	0	25	0
Contact Team	35	25	25	25	35	0
Custom Objects 1-40	5	5	5	0	5	0
Division	35	25	25	35	35	0
Lead	5	5	5	0	5	0
Lead Event	20	10	20	20	20	0
Lead Team	35	25	25	25	35	0
Opportunity	5	25	25	0	25	0
Opportunity Event	20	10	20	20	20	0
Opportunity Partner	20	10	20	20	20	0
Opportunity Team	35	25	25	25	35	0
Product	5	5	5	0	5	0

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

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link/ Concatenated Fields
Account	25	0	0	25	25	25	0
Account Event	20	10	10	50	20	50	0
Account Partner	20	10	10	50	20	50	0
Account Team	35	25	25	50	25	50	0
Activity	25	0	0	25	25	25	0
Assessment	5	0	0	5	5	5	0
Business Plan Team	35	25	25	50	25	50	0
Campaign	5	0	0	5	5	5	0
Contact	25	0	0	25	25	25	0
Contact Team	35	25	25	50	25	50	0
Custom Objects 1-40	5	0	0	5	5	5	0
Division	35	30	20	100	30	60	0
Lead	5	0	0	5	5	5	0
Lead Event	20	10	10	50	20	50	0
Lead Team	35	25	25	50	25	50	0
Opportunity	25	0	0	25	25	25	0

Record Type	Number	Percent	Phone	Picklist	Text (Long)	Text (Short)	Web Link/ Concatenated Fields
Opportunity Event	20	10	10	50	20	50	0
Opportunity Partner	20	10	10	50	20	50	0
Opportunity Team	35	25	25	50	25	50	0
Product	5	0	0	5	5	5	0
Product Indication	35	30	20	100	30	60	0
Revenue	5	0	0	5	5	5	0
Service Request	25	0	0	25	25	25	0
Service Request Team	35	25	25	50	25	50	0

Managing Obsolete Custom Fields

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

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

Repurposing Customs Fields

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

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

To repurpose custom fields

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

   For more information on editing fields, see Creating and Editing Fields (on page 1219).
8. Review and update areas of Oracle CRM On Demand in which the custom field occurred, for example in page layouts, search layouts, workflows, and so on.

Hiding Custom Fields

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

Marking Custom Fields as Not Used

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

To mark custom fields as not used

1 In the upper-right corner of any page, click the Admin global link.
2 In the Application Customization section, click the Application Customization link.
3 In the Record Types Setup section, click the link for the required record type.
4 In the Field Management section, click *record type* Field Setup.
5 Locate the custom field you require and click Edit.
6 Edit the custom field to indicate that it is not used.

   For more information on editing fields, see Creating and Editing Fields (on page 1219).
7 Review and update areas of Oracle CRM On Demand in which the custom field occurred, for example in page layouts, search layouts, workflows, and so on.

About Conditionally Required Fields

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

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

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

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

- You must make sure that the conditionally required field is displayed on the relevant page layouts. Otherwise, users will not be able to enter a value for the field when it becomes required. Similarly, it is recommended that you select the Always On Layout check box for the conditionally required field in the Page Layout Wizard, so that users cannot remove the field from their page layouts. If some users have already personalized their page layouts, then you might need to reset the personalized page layouts to the default layout after you set up the conditionally required field. For more information, see Resetting Personalized Page Layouts (on page 1420).
- If you want a conditionally required field to always be required for a certain role, then you can make the field required in the page layout that is used for that role. The field is then required in all cases where that page layout is used, even if the condition that is defined for the field at field level is not met. Where other page layouts are used, the field is required only when the condition is met.

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

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

Expression Builder Functionality for Conditionally Required Fields

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

- **Functions.** The following Expression Builder functions only are supported:
  - FieldValue (on page 1906)
  - FindNoneOf (on page 1907)
  - FindOneOf (on page 1907)
  - IfNull (on page 1909)
  - IIf (on page 1909)
  - InStr (on page 1910)
  - Left (on page 1917)
  - Len (on page 1918)
  - LN (on page 1919)
  - LookupName (on page 1920)
  - LookupValue (on page 1921)
  - Mid (on page 1923)
  - Right (on page 1926)
- **Data types.** You cannot use fields of the Date or Date Time field type in expressions for conditionally required fields. You can use all other field types that are supported for use in Expression Builder.
- **Operators.** No limitations apply.

For more information about using Expression Builder, see Expression Builder (on page 1886).

Limitations When Editing Conditionally Required Fields

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

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

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

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

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

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

Creating and Editing Fields

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

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

The Integration Tag Web Services v2.0 column in the *record type* Fields page shows the integration tag for each field. These are the field names used in the WSDL files for Web Services v2.0. For more information about WSDL files, see Downloading WSDL and Schema Files (on page 1839).

For certain record types, you can optionally set up a custom field to act as a related information field. The following fields on the Field Edit page are used only if you are setting up a related information field:

- Enable Related Information
- Related Record Type
- Related Field

NOTE: Some of the remaining fields on the Field Edit page become read-only after you select the Enable Related Information check box.

For information about custom related information fields and how to create them, see About Custom Related Information Fields (on page 1226) and Creating Custom Related Information Fields (on page 1227).

For certain record types, you can optionally set up a custom field of the Picklist field type to take its list of values from another picklist field. The following fields on the Field Edit page are used only if you are setting up a picklist field to take its values from another picklist field:

- Enable Shared Picklist Values
- Shared Record Type
- Shared Field

NOTE: The Shared Field and Shared Record Type fields become available after you select the Enable Shared Picklist Values check box.

For information about setting up a custom picklist field to take its list of values from another picklist field, see Creating Custom Picklist Fields with Shared Values (on page 1230).

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

To create custom fields and edit fields

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Types Setup section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Setup.
5. On the Fields page:
   - Click New Field if you are creating a custom field.
   - Click the Edit link for the field to edit the field's definition.

   NOTE: If you have edited a standard field and want to reset all edited values to the default settings, click the Default button located beside the Save and Cancel buttons.
6. On the Field Edit page, enter a Display Name.

   The display name is the label for the field.
7. On the Field Edit page, select a Field Type if you are creating a field.

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

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

Field Type	Maximum Length	Notes
Check Box	n/a	**NOTE:** Users are not compelled to select a field of type Checkbox that is marked as Required. If you want the check box field to have a value of True (that is, you want the check box to be selected), then you must use field validation rules on the check box field. For more information, see About Field Management (on page 1201).
Date	25	

Field Type	Maximum Length	Notes
Date/Time	25	
Integer	10	Whole numbers ranging in value from -2147483647 to 2147483647.
Multi-select picklist		You cannot define a default value for a multi-select picklist.
Number	10	Numbers ranging in value from - 2147483648 to 2147483647.
Phone	35	
Picklist	30	A maximum of 1000 values can be defined for a picklist. However, only 300 of these values are available in the user interface. The total set of picklist values retrieved at run time is calculated based on the number of picklist values multiplied by the number of languages that are active at the company level. This number must not exceed 10000. For example, if there are 900 list of values and 12 active languages, then Oracle CRM On Demand cannot access this picklist because the combined list of retrieved values is 10800, which exceeds 10000. Although the maximum length for picklist values is 30, only the first 28 characters are used to determine whether an entered value is a duplicate of an existing value. **NOTE:** When defining picklist values, the picklist order for each language is independent. That is, when you define the picklist value order for one language, this order is not automatically duplicated if you translate the picklist into other languages. If you want to keep the picklist value order consistent for all languages, then you must manually set the correct order for all translations.
Text (Long)	255	Text fields use a single-line text field.
Text (Short)	40	Text fields use a single-line text field. However, different fields use different lengths.
Text (Short-Maskable)	40	Maskable fields allow you to hide some data in certain record types from some users. For example, if a maskable field contains the value 4558785236, then users see XXXX5236. For more information, see About Maskable Fields (on page 60).

Field Type	Maximum Length	Notes
Web Link	n/a	Web Link custom fields allow you to create context-sensitive hyperlinks in your layouts. The Display Text field can contain up to 250 characters. The URL field can contain up to 8000 characters. Browsers have different maximum URL lengths. If you specify a URL that is too long, then it might not work as intended. The URL length changes if you are using parameter substitution. The combined total of Web links and concatenated fields that you can create varies with the record type, but for some record types the combined total is 100 Web links and concatenated fields. For more information about fields in Oracle CRM On Demand, see About Custom Fields (on page 1208). For more information, see Setting Up Web Links (on page 1233).
Concatenated Field	n/a	A *concatenated field* is a field that can display the values from multiple fields and can also display additional text. The combined total of Web links and concatenated fields that you can create varies with the record type, but for some record types the combined total is 100 Web links and concatenated fields. For more information about fields in Oracle CRM On Demand, see About Custom Fields (on page 1208). You can set up concatenated fields for most record types. For more information, see Setting Up Concatenated Fields (on page 1247).

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

9 Click Save.

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

Field	Comments
Required	Select this check box to make the field a required field when creating or updating records. For example, you can require that all users fill in the Account field when adding new contacts. **NOTE:** Users are not compelled to select a field of type Checkbox that is marked as Required. If you want the check box field to have a value of True (that is, you want the check box to be selected), then you must use field validation rules on the check box field. For more information, see About Field Management (on page 1201).

Field	Comments
Conditionally Required	If you want the field to be required only when a defined condition is met, then enter an expression for the condition directly, or click the *fx* icon to open the Expression Builder window. **NOTE:** In field management, a field can be set up as required, or as conditionally required, but not both. So, if the Required check box is selected, then you cannot enter an expression in the Conditionally Required field. Some limitations apply to the Expression Builder functionality that you can use in the conditions for conditionally required fields. For more information about conditionally required fields and the limitations that apply to the Expression Builder functionality, see About Conditionally Required Fields (on page 1217).
Default Value	Enter a value or an expression directly, or click the *fx* icon to open the Expression Builder window. You can add complex expressions only if your role includes the Advanced Field Management privilege. This field can contain an expression up to a maximum of 1024 characters. If you create an expression to set a default value, then the result of the expression must not exceed the maximum number of characters allowed in the field. In addition, any string or numeric literal passed to a function in Expression Builder must not exceed 75 characters. If you enter the default value directly in this field, the number of characters in the default value must not exceed the maximum number of characters allowed for the field type. For number type fields, the value must be within the range of values for the field. For more information about setting default values, see About Field Management (on page 1201). For information about the syntax that you can use with expressions, see Expression Builder (on page 1886). **NOTE:** If you assign a default value to a maskable field, then the full default value is displayed in the field when a user creates a new record, even if the user's role does not include the View Masked Data privilege.
Read Only	Select this check box to make the field read-only.
Copy Enabled	Select this check box to allow this field to be copied when the record type is copied using the Copy Record button on the record detail page.
Optimized	This check box is automatically enabled when you select a field type for which optimized fields are available for that record type. The remaining number of available optimized fields is displayed to the right of the Optimized check box. You must select the Optimized check box if you require the optimized version of the field.

Field	Comments
	NOTE: When the Optimized check box is selected for a field and saved, you cannot deselect it on the Edit page. However, you can rename the field, if you want to repurpose it.
Description	Enter additional information about the field.
Post Default	This field is displayed only if your user role includes the Advanced Field Management privilege. Select this check box if you require that the field is not automatically filled with the default value when a new record is created. The specified default value is set when the record is saved only if a value is not supplied by the user or by integration tools. **NOTE:** You cannot select Post Default for a check box field.
Field Validation	This field is displayed only if your user role includes the Advanced Field Management privilege. Enter an expression directly, or, click the *fx* icon to open the Expression Builder window. This field can contain a maximum of 1024 characters. For more information about field validation, see About Field Management (on page 1201), and for information about the syntax you can use for expressions, see Expression Builder (on page 1886).
Field Validation Error Message	This field is displayed only if your user role includes the Advanced Field Management privilege. Enter a custom error message to be displayed in addition to the standard message if validation fails for the field. The message can contain only letters, numbers, spaces, commas, periods, and dashes. The following shows how the error messages are displayed, depending on whether you specify a custom error message: If field validation is set, and no custom message specified: The value entered for '[*Field*]' does not meet the validation rules set by your company administrator. The validation condition is '[*Rule*]' (*error code*). If field validation is set, and a custom message is specified: [*Custom Error Message*] (*error code*).

Field	Comments

Tooltip Display Format	This field is displayed only if your user role includes the Advanced Field Management privilege.
	
	Select HTML or Plain Text from the drop-down list to select the format in which your tooltip is displayed. The default value for this field is Plain Text.
	
	When using HTML formatted tooltips, performance is better if you avoid complex HTML and reduce the number of images displayed in the tooltip. Interactive controls, such as hyperlinks, are not supported. It is also recommended that you use padding when using HTML formatted tooltips to make the tooltip text easier to read. When you use the HTML tag <DIV>, it is recommended to use a border to ensure that the content in the <DIV> tag stays in the tooltip box. For example:
	
	`<div style="background-color:red;padding:3px 8px; border-radius:5px;">`
	
	`This is a tooltip message with padding and a red background.`
	
	`</div>`
	
	NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (on page 1334).

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

11 Click Save.

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

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

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

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

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

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

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

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

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

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

13 If you created a picklist or multi-select picklist:
   a Click the Edit Picklist link for the custom field.
   b In the Picklist Values box, enter each value on a separate line.
   c Save the record.
   d (Optional) If your company uses picklist value groups, then map the picklist values to the picklist value groups, for more information, see Mapping Picklist Values to Picklist Value Groups (on page 1257).

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

About Custom Related Information Fields

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

However, you might have a requirement to display the values from a field in a related record type for which a joined field is not available. For example, you might want to display the phone number of the related contact's assistant on the Detail page of the custom object 04 record, but a joined field is not available for the Assistant Phone # field in the Contact record type. Or, you might want to display the values from a custom field in the Contact record type in the list of custom object 04 records that appears on a Detail page for another linked record type, such as the Custom Object 05 record type. For the Custom Object record types and certain other record types, you can create custom related information fields that enable you to display information from fields for which joined fields are not available. For information about creating custom related information fields, see Creating Custom Related Information Fields (on page 1227).

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

About Updating Values in Custom Related Information Fields

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

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

Example of Using Custom Related Information Fields

Your company owns and manages conference centers, and it provides conferencing facilities to other companies, government clients, and so on. You use a custom object record type to track information about events and another custom object record type to track information about the rooms that are used for the events. Each room is used for many events, and each event can use a number of rooms, so that you need a many-to-many relationship between the record types. To create the many-to-many relationship in Oracle CRM On Demand, you use a third custom object record type as an intersection table to track information about each room booking or session. You then create a one-to-many relationship between rooms and sessions, and a one-to-many relationship between events and sessions, which gives you a many-to-many relationship between rooms and events. For information about setting up many-to-many relationships between custom objects, see About Many-to-Many Relationships for Custom Objects (on page 1359).

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

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

To configure the Event and Session record types

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

   You can give the new fields on the Session record type the same names as the fields on the Room record type, or you can give them different names. For information about creating custom fields, see Creating Custom Related Information Fields (on page 1227).
2. View the Related Field Initialization Queue page to confirm that the initialization request for the field completes successfully.

   For more information, see Creating Custom Related Information Fields (on page 1227).
3. In the Application Customization pages for the Event record type, create or edit a related information layout for the Session record type, and move the custom fields that you created for the Session record type from the Available fields section to the Selected Fields section in the Related Information Layout wizard.

   For information about configuring related information layouts, see Customizing Related Item Layouts (on page 1258).
4. In the Application Customization pages for the Event record type, create or edit a layout for the Event Detail page, and assign the related information layout that you set up for the Session record type.

   For information about configuring page layouts, see Customizing Static Page Layouts (on page 1267) and Specifying Dynamic Page Layouts (on page 1314).
5. Assign the Event Detail page layout that you set up for the Event record type to each of the relevant user roles.

   For information about configuring roles, see Adding Roles (on page 1396).
6. If the roles are not already assigned to the users, then assign the roles to the appropriate users.

   For information about configuring user records, see Setting Up Users (on page 1363).

Creating Custom Related Information Fields

A *custom related information field* is a field on a given record type that you can use to display the values from a field in a related record type. You can add the custom related information fields that you create to page layouts and to related information layouts. For an example of how to use custom related information fields, see About Custom Related Information Fields (on page 1226).

You can set up custom related information fields for the following record types:

- Account
- Account Contact
- Activity
- Campaign
- Claim
- Contact
- Contact Portfolio
- Custom Objects
- Event
- Household Contact
- Insurance Property
- Invitee
- Involved Party
- Lead
- Objective
- Opportunity
- Opportunity Product Revenue
- Partner
- Policy
- Policy Holder
- Service Request
- Solution
- User

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

NOTE: You can optionally set up a custom field of the Picklist field type to act as a related information field, or you can optionally set it up to take its list of values from another picklist field, but you cannot set it up to do both. For information about set up a custom picklist field to share values with another picklist field, see Creating Custom Picklist Fields with Shared Values (on page 1230).

If you change an existing custom field to make it a related information field, then the following happens on any record that contains the related information field:

- If the record is associated with a record of the related record type, then the field is populated with the value from the field that you configure as the related field. If the field on the record already contains a value, then the value is overwritten.
- If the record is not associated with a record of the related record type, then the value in the field is cleared.

If you change an existing custom related information field so that it is no longer a related information field, then on any record that contains the field, the existing value in the field remains unchanged. The field becomes editable.

The following procedure describes how to create a new custom related information field.

Before you begin:

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

To create a new custom related information field

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

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

      You might want to give the custom related information field the same name as the field on the related record type. However, you can give the fields different names.
   b In the Field Type field, select the type of field that you want to create.

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

      NOTE: You can create custom related information fields for all types of fields except Web link, concatenated, maskable, and multiselect picklist fields.
   c Select the Enable Related Information check box.
   d In the Related Record Type field, select the related record type.

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

      NOTE: After you select both the field type and the related record type, all of the fields of the selected field type in the selected related record type are available for selection in the field called Related Field.
   e In the field called Related Field, select the name of the field whose information you want the new custom field to display.
   f Save the new field.
7 (Optional) Enter a translation of the name of the new field, as follows:
   a On the *record type* Fields page, from the Translation Language drop-down list, select the language whose translation you want to enter.
   b Click the Edit link for the field whose name you want to translate.
   c Enter the translation in the Display Name field, and click Save.

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

      NOTE: You can also enter translations of the tooltip and description for the field.
   d Repeat steps a through c for each language whose translation you want to enter.
   e To continue working in the *record type* Fields page after you finish entering the translations, in the Language drop-down list, select the default language for your company.

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

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

To view the status of an initialization request

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

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

The Related Field Initialization Queue page appears with information about the initialization process.

You can add the new field to page layouts for the record type on which you created the field and to the record type's related information layouts for other record types. For example, if you create a custom related information field in the Custom Object 04 record type that displays the values from a field on the Contact record type, then you can add the custom related information field to page layouts for the Custom Object 04 record type and also to the related information layouts that are used to display custom object 04 records in the Detail pages for other record types, such as the Account record type, other Custom Object record types, and so on. For an example of using custom related fields in related information layouts, see About Custom Related Information Fields (on page 1226).

Creating Custom Picklist Fields with Shared Values

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. You can set up multiple custom picklist fields as destination fields on the record types that support sharing picklist values.

When you first set up a destination field, the list of values in the field is automatically synchronized with the list of values in the source field. Any changes that you make to the list of values in the source field in the future also apply to the list of values in the destination field. For example, if you add a new value to the list of values in the source field at any time, then that value is available for selection in both the source field and the destination field. You cannot update the list of values in the destination field through any channel.

When setting up a custom picklist field as a destination field, note the following points:

- You cannot use a destination field as the source field for another picklist field.
- You can select any picklist field from any record type to use as the source field, provided that both of the following are true:
  - The source record type is one whose fields you can configure through the Application Customization pages in Oracle CRM On Demand.
  - The field that you want to use as the source field is not set up as a destination field.
- You can use a picklist field as the source field for multiple destination fields.
- If you change an existing custom picklist field that previously contained its own list of values and configure the field to take its values from another picklist field instead, then the values that were originally set up for the custom picklist field are deleted. However, records that reference the deleted values are not updated automatically. In such cases, the records show the Language Independent Code (LIC) of the picklist value that was deleted. It is recommended that you find any records that reference the deleted values and update the records as necessary to show valid values (or no value).
- If you change the configuration of an existing destination field so that the field no longer takes its list of values from another picklist field, then after you save your changes, the list of values for the custom picklist field initially contains the active values from the field that was previously used as the source field. However, the list of values in the custom picklist field becomes editable and you can add new values and disable values. Any changes that are later made to the list of values in the field that was previously used as the source field are no longer synchronized with the values in the custom picklist field.

The following record types support sharing picklist values:

- Account
- Account Contact
- Account Team
- Activity
- Campaign

- Claim
- Contact
- Contact Portfolio
- Contact Team
- Custom Objects
- Event
- Household Contact
- Insurance Property
- Invitee
- Involved Party
- Lead
- Lead Team
- Objective
- Opportunity
- Opportunity Product Revenue
- Opportunity Team
- Partner
- Policy
- Policy Holder
- Service Request
- Service Request Team
- Solution
- User

NOTE: You can optionally set up a custom field of the Picklist field type to act as a related information field, or you can optionally set it up to take its list of values from another picklist field, but you cannot set it up to do both. For information about creating custom related information fields, see Creating Custom Related Information Fields (on page 1227).

The following procedure describes how to create a custom picklist field that takes its values from another picklist field.

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

To create a custom picklist field that takes its values from another picklist field

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Types Setup section, click the link for the record type in which you want to set up the custom picklist field that will take its values from another field.
4. In the Field Management section, click *record type* Field Setup.
5. On the *record type* Fields page, click New Field.
6. On the *record type* Field Edit page, do the following:
   a. In the Display Name field, enter the name of the new field.
   b. In the Field Type field, select Picklist.
   c. Select the Enable Shared Picklist Values check box.
   d. In the Shared Record Type field, select the record type that contains the source field.
   e. In the field called Shared Field, select the name of the source field.
   f. Complete the remaining fields on the *record type* Field Edit page as required.

g. Save the new custom picklist field.

7. (Optional) Enter a translation of the name of the new field, as follows:
   a. On the *record type* Fields page, from the Translation Language drop-down list, select the language whose translation you want to enter.
   b. Click the Edit link for the field whose name you want to translate.
   c. Enter the translation in the Display Name field, and click Save.

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

      NOTE: You can also enter translations of the tooltip and description for the field.
   d. Repeat steps a through c for each language whose translation you want to enter.
   e. To continue working in the *record type* Fields page after you finish entering the translations, in the Language drop-down list, select the default language for your company.

Administering the Copy Enabled Setting

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

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

The following restrictions apply when using the copy function:

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

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

To specify which fields can be copied using the Copy button

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

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

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

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

Setting Up Custom Field Integration Tags

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

Expression Builder uses integration tags. So, they are also used when creating workflow rules and fields. For more information about workflow rules, see Creating Workflow Rules (on page 1511). For more information about creating and editing fields, see Creating and Editing Fields (on page 1219).

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

To set the integration tag for a custom field

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

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

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

Setting Up Web Links

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

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

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

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 1236).

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

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

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

To set up the Web link

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Types Setup section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Setup.
5. If the Web link field does not already exist, create a custom Web link field as described in Creating and Editing Fields (on page 1219).
6. On the Fields page, click the Edit Web Link link for the custom field.
7. On the Edit Web Link page, complete the following properties where applicable:
   a. **Field Display Name.** This field is read-only.
   b. **Type.** Select one of the following:
      - **URL.** Select this value if you want to create a Web link to another Web page, including another page in Oracle CRM On Demand.
      - **Report.** Select this value if you want to create a Web link to a report.
      - **Dashboard.** Select this value if you want to create a Web link to a dashboard.
   c. **User and System Fields.** When you create the Web link, this field automatically displays information pertaining to the user and company.

      For more information, see User and System Fields (on page 1242).
   d. *Record Type* **Fields.** When you create the Web link, this field automatically displays information pertaining to the record type.

      NOTE: *Record Type* refers to the record type for which you are setting up the Web link. For example, if you are editing a Web link for a contact record, this field appears as the Contacts Fields list.
   e. **Functions.** (URL Web link type only) Select EncodeURL from the picklist if your Oracle CRM On Demand URL requires further encoding to display it correctly.
   f. **Mark for Translation.** Select this check box if you want this Web link to appear in other activated languages.
8. In the Windows Properties section, enter the following properties:
   a. For Display Text, enter the label (display name) for the hyperlink, which the user sees in the layout.

      Example: Click Here for Stock Ticker (underlined).

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

      NOTE: If your display text is too long to fit in the layout, it is truncated. Also, the information for any variables is added at run time.
   b. Select how you want Oracle CRM On Demand to behave when a user clicks the hyperlink:
      - **Open in Current window.** Opens the hyperlinked page in the current window, replacing the current Oracle CRM On Demand session.
      - **Open in Custom Web Tab.** Opens the hyperlinked page in a custom Web tab. Select the required Web tab from the Target Custom Web Tab list.

- **Open in New window.** Opens the hyperlinked page in a new window, leaving the current Oracle CRM On Demand window unchanged. Select the Parent Window Refresh check box if you want to refresh the parent window after the user closes the new window.

c For Display Options, select Detail Page, Edit Page, or Both, depending on whether you want the Web link to appear on Detail pages only, Edit pages only, or both Detail and Edit pages. You can add Web links to a List page and to a related information section. For more information, see Managing List Access and List Order (on page 1302) and Customizing Related Item Layouts (on page 1258).

9 Fill in the Link Properties:

a For Active Link Condition, enter an expression for a condition that controls whether the Web link is active on the Detail and Edit pages. You can click the fx icon next to the Active Link Condition field to open the Expression Builder window in which you can enter an expression. For information about the syntax that you can use for expressions, see Expression Builder (on page 1886).

For example, if you enter an expression like [Revenue] > 10000, the Web link is active only if the condition, Revenue value greater than 10000, is met.

If you do not enter an expression, the Web link is always active. If you enter an expression, and the condition is not met, the Web link is still displayed, but it is not active.

b For Display Link Condition, enter an expression for a condition that controls whether the Web link is visible on the Detail and Edit pages.

For example, if you enter an expression like [Revenue] > 10000, the Web link is displayed only if the condition, Revenue value greater than 10000, is met.

If you do not enter an expression, the Web link is always displayed.

The following applies to the expressions in the Display Link Condition, and Active Link Condition fields.

- **New page.** The visible and active expressions are not evaluated for new pages. They are set to TRUE by default. The only way to disable the link is to make the expression explicitly FALSE.

- **Edit page.** The visible and active expressions are set to TRUE by default. However, you can use the Expression Builder to add a new expression.

c (Report and Dashboard Web link types only) In the Path field, click the Lookup icon (magnifying glass), then navigate to the report or dashboard you require in Shared Folders, and then click OK. The Path field is automatically populated after you select the report or dashboard.

d (Report Web Link type only) If you want any prompts that are configured for the analysis to be displayed so that users can filter the analysis, then select the Display Report Prompts check box.

e (Report and Dashboard Web link types only) If you want to specify filters that will be applied to the report at run time, then specify the filters in the Parameters field. For detailed information about specifying the filters, see About Specifying Filters for Embedded Reports and Dashboards (on page 1237).

f (Report Web link type only) Specify whether the users who view the analysis can refresh, export, or print the analysis:

- **Refresh Link.** If this check box is selected, then the Refresh link is available and users can refresh the data in the analysis.

- **Print Link.** If this check box is selected, then the Print link is available and users can print the analysis.

- **Export Link.** If this check box is selected, then the Export link is available and users can export the analysis.

g (URL Web link type only) For Url, enter the URL that is invoked when the user clicks the hyperlink, such as www.oracle.com.

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

If you do not specify any URL, the user is directed to a void URL when clicking the link.

Each browser has a maximum URL length. If you specify a URL that exceeds this length, then users might see indeterminate behavior on the browser when they click the Web link. Make sure that the URL that you specify is a valid uniform resource identifier (URI). If it is not valid, then an error message is displayed instead of the link.

NOTE: Although it is possible to use a URL to embed a report or dashboard in a custom Web applet, Web tab, or Web link of the URL type, this functionality is not fully supported, and the URL might not work after an upgrade.

h (URL Web link type only) For Request Method, select the method with which you want to send your Web link request:

- **GET.** A GET request sends query string parameters (name and value pairs) in the request URL. This is the default value for existing Web links.
- **POST.** A POST request sends query string parameters (name and value pairs) in the HTTP message body. This is the default value for new Web links.

10 For user and system fields, select an option from the User and System Fields list to add parameter fields to the URL, Display Text, or Parameters field at the current position of the cursor.

For example, if you choose User id from the list, %%%User id%%% is inserted into the URL field, or the Display Text field, or the Parameters field, depending on where your cursor is positioned. At run time, %%%User id%%% is replaced with the user ID of the user who is logged in. As another example, if you choose Host Name from the list, %%%Hostname%%% is inserted at the cursor position. At run-time, this parameter is replaced with the host name of the server where Oracle CRM On Demand is running. This is useful in configurations containing a URL to Oracle CRM On Demand as it is no longer necessary to manually modify the Oracle CRM On Demand host name when migrating from one environment to another.

11 For *record type* fields, place your cursor in the URL, Display Text, or Parameters field where you want to add a parameter, and then select the field that you want to include from the list.

For example, if you select the field Row id, %%%Row id%%% is inserted into the URL field, or the Display Text field, or the Parameters field, depending on where your cursor is positioned. At run time, this parameter is replaced with the row ID of the current record.

NOTE: A placeholder for the name of a record type is indicated by the words, *record type*, in italics. For example, *record type* refers to the record type where you add the Web link custom field. For example, if you are editing a Web link for a contact record, this field appears as the Contacts Fields list.

12 Click Save.

13 Add the Web link field to the *record type* page layout, as described in Customizing Static Page Layouts (on page 1267).

About Embedding Reports and Dashboards in Oracle CRM On Demand

You can embed reports from the Analytics catalog in any of the following locations:

- Custom Web applets of the Report type, for record-type Detail page and Homepages. See Creating Web Applets for Record Types (on page 1279) and Creating Report Web Applets (on page 1287).
- Global Web applets of the Report type, for My Homepage and the Action bar. See Creating Global Web Applets (on page 1333) and Creating Report Web Applets (on page 1287).
- Custom Web tabs of the Report type. See Displaying External Web Pages, Reports, and Dashboards in Tabs (on page 1324).
- Custom Web links of the Report type. See Setting Up Web Links (on page 1233).

- My Homepage and record-type Homepages, using the Homepage Custom Report features. See Enabling Custom Reports in My Homepage (on page 1340) and Creating Homepage Custom Reports (on page 1302).

You can embed dashboards from the Analytics catalog in any of the following locations:

- Custom Web applets of the Dashboard type, for record-type Detail page and Homepages. See Creating Web Applets for Record Types (on page 1279) and Creating Dashboard Web Applets (on page 1289).
- Global Web applets of the Dashboard type, for My Homepage and the Action bar. See Creating Global Web Applets (on page 1333) and Creating Dashboard Web Applets (on page 1289).
- Custom Web tabs of the Dashboard type. See Displaying External Web Pages, Reports, and Dashboards in Tabs (on page 1324).
- Custom Web links of the Dashboard type. See Setting Up Web Links (on page 1233).

To embed a report or dashboard from the Analytics catalog, the report or dashboard must be stored under Shared Folders, and you must have access to the folder where the report or dashboard is located.

NOTE: Although it is possible to use a URL to embed a report or dashboard in a custom Web applet, Web tab, or Web link of the URL type, this functionality is not fully supported, and the URL might not work after an upgrade.

Customized Code Enablement Setting

If the Customized Code Enablement field in a user's profile is set to Disabled with indicator, then any reports and dashboards that are embedded in custom Web applets do not run for that user.

About Specifying Filters for Embedded Reports and Dashboards

You can embed reports and dashboards in custom Web applet and Web tabs. You can also configure Web link fields to open reports and dashboards.

When you create a custom Web applet, Web tab, or Web link of the Report or Dashboard type, you can specify filters that will be applied at run time. For a dashboard, the filters that you specify apply to all of the reports in the dashboard.

Each of the columns that you specify in the filters must also have a filter configured for it in the report that you want to embed, and if you are embedding a dashboard, then the column must have a filter configured for it in each of the reports in the dashboard. The filter in the report can be set to "is prompted" or configured with an operator and a value. If a filter is not configured for a column in the report, then any filter that you specify for that column in the Web applet, Web tab, or Web link will not be applied when the report is run. For information about adding filters to columns in reports, see Adding Filters to Columns in Analytics (on page 976).

NOTE: When you create a custom Web applet, Web tab, or Web link of the Report type, you can optionally specify that any prompts that are defined for the embedded report are to be displayed at run time, by selecting the Display Report Prompts check box. Displaying prompts at run time allows users to filter the report. However, the setting in the Display Report Prompts check box takes precedence over any filters that are defined in the Parameters field for the embedded report or dashboard. Therefore, if you select the Display Report Prompts check box for a custom Web applet, Web tab, or Web link, then any filters that are defined in the Parameters field as described in this topic are ignored, even if no prompts are defined for the embedded report.

Syntax for Specifying Filters

You can specify the parameters for filters in either of the following ways:

- Using the P*n* parameters, which is referred to as the P*n* syntax.
- Using groups of the op*n,* col*n*, and val*n* parameters, which is referred to as the op*n* syntax.

You cannot use a mixture of the two types of syntax.

Using the P*n* syntax, you can specify a maximum of six filters. In the P0 parameter, you specify the number of filters that you want to set up. The valid values for the P0 parameter are integers 1 through 6. The P0 parameter can be used only once in the parameter string. Each filter uses three parameters to contain the operator, the column, and the value. You specify the first filter in parameters P1-P3. P1 must specify the operator, P2 must specify the column, and P3 must specify the value. You specify the subsequent filters in sets of three parameters, namely P4-P6, P7-P9, P10-P12, P13-P15, and P16-P18. You must use an ampersand (&) to separate the parameters. Each parameter can be used only once in the parameter string.

For a single filter, the syntax is as follows, although the parameters can be placed in any order in the parameter string:

`P0=1&P1=`*`operator`*`&P2=`*`table.column`*`&P3=`*`value`*

To specify additional filters, you add parameters P4-P6, P7-P9, and so on, and increase the value of the P0 parameter to match the number of filters that you add. So, for two filters, the syntax is as follows:

`P0=2&P1=`*`operator`*`&P2=`*`table.column`*`&P3=`*`value`*`&P4=`*`operator`*`&P5=`*`table.column`*`&P6=`*`value`*

Using the op*n* syntax, there is no limit to the number of filters that you can specify. Each filter uses a group of three parameters: the op*n* parameter specifies the operator, the col*n* parameter specifies the column, and the val*n* parameter specifies the value. You must use an ampersand (&) to separate the parameters. You must number each of the parameters in a filter group with the same number, which must be an integer greater than 0 (zero), and you must number the groups of parameters sequentially. For a single filter, the syntax is as follows, although the parameters can be placed in any order in the parameter string:

`op1=`*`operator`*`&col1=`*`table.column`*`&val1=`*`value`*

Similarly, for two filters, the syntax is as follows:

`op1=`*`operator`*`&col1=`*`table.column`*`&val1=`*`value`*`&op2=`*`operator`*`&col2=`*`table.column`*`&val2=`*`value`*

NOTE: In the column parameter, if a table name or a column name contains a space, then you must enclose that name in double quotation marks. If a table name or a column name does not contain a space, then you do not need to enclose the name in double quotation marks, but you can do so if you wish. This is true for both types of syntax.

Page Parameter

When you embed a dashboard, you can also optionally use the Page parameter to specify which page of the dashboard opens when the dashboard is rendered. The syntax for the Page parameter is:

`Page=`*`page name`*

where *page name* is the name of the page as it appears in the dashboard. Do not enclose the page name in double quotation marks, even if the name contains one or more spaces. You can specify the Page parameter on its own or with other parameters. You can place the Page parameter in any location in the parameter string, but you must use an ampersand (&) to separate the Page parameter from any parameter that precedes it or follows it.

The Page parameter is not validated when you save the parameters. If you do not include the Page parameter, or if you include it but leave the parameter value blank, then the first page of the dashboard opens when the dashboard is rendered. If you specify a value that is anything other than the valid name of a page in the selected dashboard, then an error is displayed at run time.

About Special Characters in Parameters

If a table name, column name, value, or dashboard page name that you specify in a parameter includes any of the following characters, then the character must be encoded, as follows:

- % (percent sign). Encode as %25.
- & (ampersand). Encode as %26.
- [(left bracket). Encode as %5B.
-] (right bracket). Encode as %5D.
- + (plus sign). Encode as %2B.

If these characters are not encoded, then an error might be returned when you try to save the parameters, or the results might not be correct at run time.

Parameter Validation

With the exception of the Page parameter, the parameters that you specify are validated when you try to save your changes. If any errors are detected, then you must fix those errors before you can save your changes.

NOTE: In releases earlier than Release 40, the filter parameters were not validated before they were saved. Therefore, a filter parameter that was specified for an embedded report or dashboard in a release earlier than Release 40 might contain an error. If any errors are detected in the syntax of a filter when an embedded report or dashboard is rendered, then an error message is displayed. Also, if you edit an existing Web applet, Web tab, or Web link field of the Report or Dashboard type, and if you make a change to any field, then when you attempt to save your changes, all of the fields including the Parameters field are validated. If any errors are detected, then you must fix those errors.

The following sections describe the parameters that make up a filter.

Operator

The following table lists the operators that you can use in a filter.

Operator	Description
eq	Equal to or in
neq	Not equal to or not in
lt	Less than
gt	Greater than
ge	Greater than or equal to
le	Less than or equal to
bwith	Begins with
ewith	Ends with

Operator	Description

cany	Contains any. The value parameter can have multiple values, each separated with a plus sign (+). If you use the P*n* syntax, then you must specify the number of values at the start of the list of values. If you use the op*n* syntax, then do not specify the number of values, otherwise, Oracle CRM On Demand will assume that the specified number is another value.
	
	For example, to find account regions East, West, and Central (that is, three regions):
	
	`P0=1&P1=cany&P2="Account"."Account Region"&P3=3+East+West+Central`
	
	or:
	
	`op1=cany&col1="Account"."Account Region"&val1=East+West+Central`

call	Contains all. The value parameter can have multiple values, each separated with a plus sign (+). If you use the P*n* syntax, then you must specify the number of values at the start of the list of values. If you use the op*n* syntax, then do not specify the number of values, otherwise, Oracle CRM On Demand will assume that the specified number is another value.

like	Like. The value parameter must contain a value. The value string must end with the wildcard % (percent sign), otherwise, the like operator will return only exact matches for the string. The percent sign must be encoded as %25.
	
	For example, to find account names that are like Acme:
	
	`P0=1&P1=like&P2="Account"."Account Name"&P3=Acme%25`
	
	or:
	
	`op1=like&col1="Account"."Account Name"&val1=Acme%25`

top	Top *n* items. For example, to find the top 6 sales revenues:
	
	`P0=1&P1=top&P2="Account"."Account Revenue"&P3=6`
	
	or:
	
	`op1=top&col1="Account"."Account Revenue"&val1=6`

Operator	Description

bottom	Bottom *n* items. For example, to find the bottom 4 sales revenues:
	`P0=1&P1=bottom&P2="Account"."Account Revenue"&P3=4`
	or:
	`op1=bottom&col1="Account"."Account Revenue"&val1=4`

bet	Between. The value parameter must have two values, separated by a plus sign (+). If you use the P*n* syntax, then you must specify the number of values (2) at the start of the list of values. If you use the op*n* syntax, then do not specify the number of values, otherwise, Oracle CRM On Demand will assume that the specified number is another value. For example, to filter on account revenue between 100,000 and 500,000: `P0=1&P1=bet&P2="Account"."Account Revenue"&P3=2+100000+500000` or: op1=bet&col1="Account"."Account Revenue"&val1=100000+500000
null	Is null. The value parameter must be 0 (zero) and it cannot be omitted.
nnull	Is not null. The value parameter must be 0 (zero) and it cannot be omitted.

Column

When specifying the column, note the following points:

- You must specify both the table name and the column name, separated by a period (.).
- If a table name or a column name contains a space, then you must enclose that name in double quotation marks. If a table name or a column name does not contain a space, then you do not need to enclose the name in double quotation marks, but you can do so if you wish. This is true for both types of syntax. For example, all of the following are valid:

  `"Account"."Account Name"`

  `"Service Request".Area`

  `Account."Account Name"`

- You must use the original column names, and not the display names.

Value

When specifying the value for a filter, note the following points:

- You can specify a value directly, or you can specify a field as a parameter.
- If you use the op*n* syntax, and if you directly specify a value that contains a space, then the value must be enclosed in double quotation marks. If more than one value is specified, and if any one of the values contains a space, then each of the specified values must be enclosed in double quotation marks, for example:

  ```
  val1="New York"+"Alabama"+"California"
  ```

  If you use the P*n* syntax, then you do not need to enclose a value that contains a space within double quotation marks.
- To include a user or system field in a filter parameter, place your cursor in the Parameters field at the position where you want to add the parameter, and then select the field that you want to include from the User and System Fields list.

  For information about the user and system fields that you can use in the parameters, see User and System Fields (on page 1242).
- (Web applets for record-type Detail pages only, and Web links) To include a field from the record type in a filter parameter, place your cursor in the Parameters field at the position where you want to add the field, and then select the field from the *record type* Fields list, where *record type* is the name of the record type for which you are creating the applet.

  For example, if you select the Row Id field from the *record type* Fields list, then %%%Row_Id%%% is inserted. At run time, %%%Row_Id%%% is replaced with the row ID of the current record.

NOTE: The URL for a report or dashboard is generated at run time. The length of the URL for the report or dashboard varies, depending on the values that are passed to the URL for the filters at run time. Each browser has a maximum URL length. If the URL for a report or dashboard exceeds this length, then users might see indeterminate behavior on the browser when they attempt to view that report or dashboard.

NOTE: You can specify parameters for a report, a dashboard, or a dashboard page in a Send Email action on a scheduled event for Analytics in the same way that you specify the parameters for an embedded report or dashboard in a Web applet, tab, or link. However, you cannot select fields to specify as parameter values in a Send Email action. For information about setting up scheduled events for Analytics, see Creating Scheduled Events for Analytics (on page 1521).

User and System Fields

The following table describes the various user and system fields that you can use as parameters in custom Web links, concatenated fields, custom Web applets, and custom Web tabs.

Field	Description
Animation Flag	Determines whether the display of notes in the Message Center and record Detail pages is animated.
Business Unit	The company's business unit.
Calendar Week Start Day	Start day of the calendar week for the logged in user.
Company Language Code	The three-letter code for the user's company language. The codes for each language are listed in an appendix in Oracle Migration Tool On Demand Guide.
Company Location	The company location.

Field	Description
Company Name	The company name.
Default Calendar View	The calendar view for the logged in user, which is displayed each time you click the Calendar tab.
Default Search Object	The record type that appears in the search picklist in the Action bar when the user signs in to Oracle CRM On Demand.
Host Name	The host name of the server where Oracle CRM On Demand is running.
HUD Mode	Determines whether the user sees links for the related information sections on a Detail page at the bottom of the browser window.
Number of Security Questions	The number of security questions required for the the logged in user's organization.
Preview Mode	The record preview mode of the logged in user.
Primary Division ID	The primary division ID associated with the logged in user.
Primary Division Name	The primary division name associated with the logged in user.
Primary Group Name	The name of the group to which the logged in user has been added.
Primary Organization ID	The primary organization ID of the logged in user.
Primary Position ID	The primary position ID of the logged in user.
Related Information Format	The format of the related information sections on record Detail pages, for example, lists, tabs.
Sales Method ID	The sales method ID of the logged in user.
SSO Token	The authentication information that is required to access the company's Single Sign-On (SSO) portal.
Theme ID	The theme that is used when the user signs in to Oracle CRM On Demand.
User Alias	The alias of the logged in user.
User Authentication Type	The type of authentication when the user logs in to Oracle CRM On Demand, for example, User ID/Password Only, Single Sign-On Only.
User Country	The country name of the logged in use.

Field	Description
User Currency Code	The three-letter code for the user's currency.
User First Name	The first name of the logged in user.
User Full Name	The full name of the logged in user.
User Email	The email address of the user who is logged in.
User ID	The user sign in ID of the user who is logged in.
User Language Code	The three-letter code for the user's language. The codes for each language are listed in an appendix in Oracle Migration Tool On Demand Guide.
User Last Logged In	The last log in time of the logged in user.
User Last Name	The last name of the logged in user.
User Locale Code	The three-letter code for the user's locale. You can see which locales are supported in the Locale field in the User Detail page. For more information, see the Supported User Locale Codes in Oracle CRM On Demand table in this topic.
User Password Flag	Determines whether the logged in user’s password is temporary.
User Row ID	The row ID of the logged in user.
User Timezone ID	The timezone ID of the logged in user.
Welcome Flag	indicates whether the Oracle CRM On Demand Welcome Page appears each time the user signs in to Oracle CRM On Demand.
XSS action code	The behavior of the cross-site scripting (XSS) protection available for the logged in user's company, for example, Block, Correct, and so on.

Supported User Locale Codes in Oracle CRM On Demand

The following table lists the locales and user locale codes.

Locale	User Locale Code
Chinese - Hong Kong SAR	ZHH
Chinese - PRC	CHS
Chinese - Singapore	ZHI

Locale	User Locale Code
Chinese - Taiwan	CHT
Czech - Czech Republic	CSY
Danish - Denmark	DAN
Dutch - Belgium	NLB
Dutch - Netherlands	NLD
English - Australia	ENA
English - Canada	ENC
English - India	ENN
English - Ireland	ENI
English - New Zealand	ENZ
English - Philippines	ENP
English - South Africa	ENS
English - United Kingdom	ENG
English - United States	ENU
Finnish - Finland	FIN
French - Belgium	FRB
French - Canada	FRC
French - France	FRA
French - Luxembourg	FRL
French - Switzerland	FRS
German - Austria	DEA
German - Germany	DEU
German - Luxembourg	DEL

Locale	User Locale Code
German - Switzerland	DES
Greek - Greece	ELL
Hungarian - Hungary	HUN
Indonesian - Indonesia	IND
Italian - Italy	ITA
Japanese - Japan	JPN
Korean - Korea	KOR
Malay - Malaysia	MSL
Norwegian - Bokmål	NOR
Polish - Poland	PLK
Portuguese - Brazil	PTB
Portuguese - Portugal	PTG
Romanian – Romania	ROU
Russian - Russia	RUS
Slovak - Slovakia	SVK
Spanish - Chile	ESL
Spanish - Mexico	ESM
Spanish - Spain	ESN
Swedish - Sweden	SVE
Thai - Thailand	THA
Turkish - Turkey	TRK

About Using Web Links to Create New Integration Scenarios

Adding Web link custom fields to Oracle CRM On Demand provides many new integration opportunities. You can create an integration, based on the user interface, to on premise and external systems that allow users to navigate directly to content from Oracle CRM On Demand.

Some examples include:

- Create a link to a financial Web site based on the account ticker symbol that brings up a stock chart for the account.
- Create a link to an internal system that uses Web Services and creates a composite view of data from multiple on premise and hosted solutions relevant to the current account.

NOTE: Although it is possible to use a URL to embed a report or dashboard in a custom Web applet, Web tab, or Web link of the URL type, this functionality is not fully supported, and the URL might not work after an upgrade. For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 1236).

For step-by-step instructions on how to create Web links, see Setting Up Web Links (on page 1233).

Setting Up Concatenated Fields

A *concatenated field* is a field that can display the values from multiple fields and can also display additional text. You set up concatenated fields when you want to combine values from a number of individual fields and you want to display this information on record Detail pages, Edit pages, related information sections, and lists. For more information on concatenated fields, see About Concatenated Fields (on page 54).

You can also optionally include expressions in concatenated fields, to determine the behavior of the fields and text within the concatenated field. For example, you can include an expression that results in certain text within the concatenated field being changed or removed if a user changes the value in another field on the record. As another example, you can include an expression that results in a default value being displayed in a field within the concatenated field, if the same field on the record is blank. The following is an example of an expression in a concatenated field:

```
The account name is %%%[{Name}]%%%%%%IIf(IfNull([{Region}],'X') = 'X', '.', ' and
the account is from the '+[{Region}]+' region.')%%%
```

In this example, the expression evaluates the value for the Region field. If the field is null, then the sentence is finished with a period immediately after the account name, and no information about the region is displayed. If the Region field is not null, then the remaining text and the value of the Region field are displayed.

Limitations When Setting Up Concatenated Fields

Consider the following limitations when setting up concatenated fields:

- The following Expression Builder functions only are supported for use in concatenated fields:
  - FieldValue
  - FindNoneOf
  - FindOneOf
  - IfNull
  - IIf
  - InStr
  - Left
  - Len
  - LN
  - LookupName
  - LookupValue

- Mid
- Right
- The maximum number of characters that can be included in the definition of the content of a concatenated field is 500. This includes the field names, function names, and text, as well as braces, brackets, line breaks, percent signs, spaces and special characters. A line break counts as two characters. You cannot enter more than 500 characters directly in the Display Text field. If you edit the display text in Expression Builder, and if more than 500 characters are included, then the following happens after you click Save in Expression Builder and return to the Edit Fields page:
  - If you try to edit the contents of the Display Text field, then the content of the Display Text field is truncated to 500 characters.
  - If you try to save the field configuration, then you receive an error message.

For more information about expressions and Expression Builder, see Using Expression Builder (on page 1887) and About Expressions (on page 1890).

To set up concatenated fields in Oracle CRM On Demand, complete the steps in the following procedure. For more information on restrictions when using concatenated fields, see Restrictions When Using Concatenated Fields (on page 1249).

To set up a concatenated field

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Types Setup section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Setup.
5. If the concatenated field does not already exist, then create a concatenated field.

   For more information, see Creating and Editing Fields (on page 1219).
6. On the Fields page, click the Edit Fields link for the concatenated field.
7. On the Edit Fields page, complete the following fields where applicable:
   a. **Field Display Name.** This field is read-only.
   b. **User and System Fields.** Select an option from the User and System Fields list to add parameter fields to the Display Text field at the current position of the cursor.

      For example, if you choose User id from the list, then %%%User id%%% is inserted into the Display Text field, depending on where your cursor is positioned. At run time, this parameter is replaced with the user ID of the user who is logged in.

      For more information, see User and System Fields (on page 1242).
   c. *Record Type* **Fields.** Place your cursor in the Display Text field where you want to add a field, and then select the field that you want to include from the list.

      For example, if you select the field Row id, then %%%Row id%%% is inserted into the Display Text field, depending on where your cursor is positioned. At run time, this parameter is replaced with the row ID of the current record.

      NOTE: *Record Type* refers to the record type for which you are setting up the concatenated field. For example, if you are editing a concatenated field for a contact record, this field appears as the Contacts Fields list.
   d. **Mark for Translation.** Select this check box if you want this concatenated field to appear in other activated languages.
   e. **Display Text.** Shows the fields and additional text that make up the concatenated field. In the Display Text field, you can specify the fields for the record type, user and system fields, additional text, and expressions.

For example, if you want to set up a concatenated field that is based on the Job Title and Age fields, then you can select Job Title from *Record Type* Fields, type the text ", aged", and select Age from *Record Type* Fields. The following text is then shown in the Display Text field:

%%%*Job Title*%%%, aged %%%*Age*%%%

Then, for example, the following might be displayed in the concatenated field:

Manager, aged 41

You can use the Enter key in the Display Text field to specify that text and fields appear on separate lines in the concatenated field.

You can type an expression directly in the Display Text field, or you can use Expression Builder. To open Expression Builder, click the fx icon.

TIP: You can also edit the contents of the concatenated field in Expression Builder. For example, you can add or remove text and fields. Any changes that you make in the Expression field in Expression Builder appear in the Display Text field after you click Save in Expression Builder to return to the Edit Fields page.

8 When you finish setting up the concatenated field, click Save.
9 Add the concatenated field to the Detail page.

For more information, see Customizing Static Page Layouts (on page 1267).

Related Topics

See the following topics for related information:

- About Concatenated Fields (on page 54)
- Restrictions When Using Concatenated Fields (on page 1249)
- Customizing Static Page Layouts (on page 1267)

Restrictions When Using Concatenated Fields

The following restrictions apply when using concatenated fields:

- Concatenated fields support only the following field types:
  - Address
  - Check Box
  - Currency
  - Date/Date Time
  - Integer
  - Number
  - Percent
  - Phone
  - Picklist
  - Star Rating
  - Stoplight
  - Text (Long)
  - Text (Short)

  NOTE: The Sales Stage field is not a true picklist field. Concatenated fields are not supported on this type of picklist.

- The combined total of Web links and concatenated fields that you can create varies with the record type, but for some record types the combined total is 100 Web links and concatenated fields. For more information about fields in Oracle CRM On Demand, see About Custom Fields (on page 1208).

- Concatenated fields cannot be updated through Update Values workflow actions, and cannot be included in integration events. Instead, you must use the individual fields that make up the concatenated fields.
- You cannot import or export concatenated fields in Oracle CRM On Demand. However, you can import and export the individual fields that make up the concatenated fields.
- When setting up a concatenated field with an address field, the following conditions apply:
  - You can add individual fields from an address, or more than one address, to a concatenated field.
  - Only the address fields that you add to the concatenated field appear in the concatenated field. However, when a user updates that concatenated field, the user can edit all of the fields in the relevant address templates, not just the address fields that appear in the concatenated field, unless the field is from a shared address. If an address field in a concatenated field is from a shared address on an account, contact, dealer, or partner record, then the user cannot edit the fields within the address. Instead, the user can select a different address.
- When setting up a concatenated field with a cascading picklist, all the picklists associated with the cascading picklist must be added to the concatenated field. If you do not add all the picklists, then they remain read-only, and cannot be edited.

Related Topics

See the following topics for related information:

- About Concatenated Fields (on page 54)
- Setting Up Concatenated Fields (on page 1247)
- Customizing Static Page Layouts (on page 1267)

Managing Field Labels

To use terminology that is familiar to your employees, you can change field names. For example, you can change the Account Name field label to Company Name. You can also replace your field label with an icon.

NOTE: It can take 30-60 minutes for the new field display names to appear in reports and analytics.

Before you begin. To perform this procedure, your role must include the Customize Application privilege. The Display Type and Icon menu are unavailable if the translation language is different to your user language. For more information on translating fields, see Creating and Editing Fields (on page 1219).

To rename a field

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Field Management section, click the required Field Setup link.
5. In the *record type* Fields page, click Manage Field Labels.
6. To change the field name, do the following:
   a. In the Manage Fields Labels page, select Text Only from the Display Type menu.
   b. Enter the new field name in the Display Name field.
7. To use an icon instead of a field label, do the following:
   a. In the Manage Fields Labels page, select Icon Only from the Display Type menu.
   b. (Optional) To select an icon other than the default icon, click the Lookup icon (magnifying glass) and select an icon.

   NOTE: If you select None from the Display Type menu, then no field name or icon is displayed in the record type Detail page.

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

NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated.
If you do not select Mark for Translation, the previous display names remain, unaffected by the change you made here.

Selecting the Mark for Translation check box also causes the Field Validation Error Message (from the Field Edit page) to be marked for translation if the error message exists. The Field Validation Error Message field is visible only for users whose role includes the Advanced Field Management privilege.

9 To manually enter the translated equivalent of the new name:
   a From the Translation Language drop-down list, select the language whose translation you want to enter.
   b Enter the translated equivalent in the appropriate Display Name field and click Save.
   c Click the link to return to the Fields page you just updated and select the language again, if necessary.
   The translated name appears in black text in the Display Name column.

10 Click Save.

Related Topics

See the following topics for related information:

- About Field Management (on page 1201)
- Creating and Editing Fields (on page 1219)

Using Indexed Custom Fields

To optimize the performance of Oracle CRM On Demand, you can use custom fields that have been optimized for specific record types. These optimized fields, which are called *indexed custom fields,* are special fields that improve the response time during a search or when sorting a particular list. Indexed custom fields are preconfigured in the Oracle CRM On Demand database. You can change the labels on the indexed custom fields, but you cannot change the integration tags.

NOTE: You can choose to migrate your data from a custom field to an indexed custom field to increase the performance of lists for users. To migrate the existing data to the available record types, use the export and import functionality of Oracle CRM On Demand or Web services. For more information about exporting and importing data, see Import and Export Tools (on page 1610). For more information about Web services, see Web Services Integration (on page 1838).

Indexed custom fields are prefixed with the word, *Indexed,* by default. The following record types do not support indexed custom fields:

- Assessment
- Book
- User

The following table lists the record types that support indexed custom fields:

- Account
- Account Team
- Activity
- Address (for account, contact, dealer and partners).

NOTE: There are restrictions to picklist customization for address records. See *About Picklist Customization in Address Records*.

- Appointment Contact
- Appointment, Task, and Call
- Appointment User
- Asset

  NOTE: The Portfolio and Asset record types share the same IndexPicklist fields. When you add, edit, or delete any value in one record type, the same action occurs in the other record type.

- Campaign
- Campaign Recipient
- Call Product Detail
- Call Promotional Items Dropped
- Contact
- Contact Best Times
- Contact Team
- Custom Objects 1-3
- Dealer
- Event
- Fund
- Fund Request
- Household
- Lead
- Note
- Opportunity
- Opportunity Contact Role
- Opportunity Product Revenue
- Partner Program
- Portfolio

  NOTE: The Portfolio and Asset record types share the same IndexPicklist fields. When you add, edit, or delete any value in one record type, the same action occurs in the other record type.

- Product Category
- Service Request
- Solution
- Task Contact
- Task User
- User
- Vehicle
- Vehicle Contact
- Vehicle Sales History
- Vehicle Service History

Each record type in the table has the following indexed custom fields:

- Indexed Checkbox
- Indexed Currency
- Indexed Date

- Indexed Number
- Indexed Picklist 1
- Indexed Picklist 2
- Indexed Picklist 3
- Indexed Picklist 4
- Indexed Picklist 5
- Indexed Picklist 6
- Indexed Long Text
- Indexed Short Text 1
- Indexed Short Text 2

All other record types in Oracle CRM On Demand have the following indexed custom fields:

- Indexed Number
- Indexed Date
- Indexed Checkbox
- Indexed Currency
- Indexed Picklist 1
- Indexed Picklist 2
- Indexed Picklist 3
- Indexed Picklist 4
- Indexed Picklist 5

Exceptions: For all Custom Objects, some fields use different naming conventions to those listed in the previous tables:

- Index Picklist 6 = Type
- Index Short Text 1 = Quick Search 1
- Index Short Text 2 = Quick Search 2
- Index Long Text = Name

About Picklist Customization in Address Records

All picklist customizations for addresses shared between accounts, contacts, dealers, and partners are also shared (for example, indexed picklists, custom picklist 1, custom picklist 2, and so on). However, it is possible to use a customized label for the picklist. For example, even though the picklist definition for Indexed Picklist 1 is the same for Account Address and Contact Address, the field can be renamed *My Picklist A* in one record, while the field can be renamed *My Picklist 1* in the other record. For indexed picklists, company administrators can choose which picklist to customize and use, however, the company administrators have no such control for custom picklists.

To use indexed custom fields

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Types Setup section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Setup.
5. In the *record type* Field page, click Manage Field Labels and rename the indexed custom fields as appropriate for your company, see Managing Field Labels (on page 1250).

Reverting Settings to Defaults

You can revert all relabeled field names to their original names. (The default option does not affect custom fields or picklist values you added-they do not revert to their default values.)

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

To revert settings to their defaults

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Field Management section, click the required Field Setup link.
5. In the *record type* Fields page, click the Manage Field Labels button.
6. Click the Default button.

Changing Picklist Values

Some fields give users a drop-down list of predefined values from which they must choose. This list of values is called a *picklist*. For example, the values in the Area field picklist for service requests might be Product, Installation, Maintenance, and Training.

You can add, edit, and reorder values to the picklists for fields. Picklists must contain at least one value, but the maximum number of values (active or disabled) in a picklist is 1000. The order number for a new picklist entry is automatically populated, but you can change the order number when you edit the picklist.

The system does not allow you to change picklist values used for forecasting and report metrics. However, it does allow you to change other picklist values used as the basis for standard lists that appear in other areas of the application. For those standard lists, the application still includes the records meeting the criteria, regardless of the picklist values you renamed. For more information, see About Fields, Picklists, and Metrics (on page 1356).

After you create a new picklist, an initial value called *<No Values>* is automatically available in the picklist. This value is used to communicate to users that values do not yet exist in the picklist, in the case where the field is added to a page layout before real values are added to the list. The default *<No Values>* option disappears from the picklist as soon as a custom value is added to a picklist.

CAUTION: Do not use the default *<No Values>* value as part of any new picklist or cascading picklist. Using the value in this way can lead to errors within Oracle CRM On Demand. If you want to continue to have a *<No Values>* option available in a picklist, you must add it as a custom value.

As a best practice, do not rename or reuse the existing picklist values. Instead, disable the old picklist value, create a new picklist value, and perform an import or a mass update (or alternatively, Web Services) to change all record values to new picklist values. If you change a value in a picklist, you must verify that the value is updated and changed for each individual record as this is not implemented automatically by Oracle CRM On Demand.

When changing picklist values, note the following considerations for certain record types and picklist fields:

- In Oracle CRM On Demand (the standard application), the priority of tasks is indicated in task lists by arrows. An up arrow indicates 1-High priority, no arrow indicates 2-Medium priority, and a down arrow indicates 3-Low priority. If you change the display values for the Priority field in the Activity record type from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless you use the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that you give to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that you add to the picklist for the Priority field.

- Adding or editing the values that are available by default in the picklist for the Status field for the Activity record type might produce unwanted results for activity processing. Oracle CRM On Demand specifically looks for the Completed, Submitting, Submitted, or Planned field values when it processes activities. If your company deactivates these status values and replaces them with custom values, then the activity processing in the Oracle CRM On Demand application will not work as documented. Consequently, changing the Status field picklist values for the Activity record type is not recommended.
- Due to specialized coding, customizing the Oracle CRM On Demand Life Sciences Edition Sample Transaction Type picklist, Account Call Type picklist, and Contact Call Type picklist is not supported.
- When the Status field on a service request is set to either Closed or Cancelled, Oracle CRM On Demand automatically updates the Closed Time field on the service request to show the date and time that the status was changed. Consequently, it is strongly recommended that your company does not deactivate either of these values in the Status picklist for the Service Request record type. However, your company can change the display name for the Closed value, or the Cancelled value, or both values. If your company changes the display name for the Closed value, then Oracle CRM On Demand will update the Closed Time field on a service request when the status on the service request is changed to the value that was originally named Closed. Similarly, if your company changes the display name for the Cancelled value, then Oracle CRM On Demand will update the Closed Time field on a service request when the status on the service request is changed to the value that was originally named Cancelled.

In addition, note that commas are used as separators between values when users enter multiple values in a field in a filter for a search or list. If you want to include a comma within a picklist value, then the comma must be followed by a space, so that it will not be treated as a separator in a list of values. If you do not enter a space after a comma when you create or edit a picklist value, then the space is automatically inserted when you save the picklist value. For example, if you enter Value,2 as a picklist value, it is saved as Value, 2.

NOTE: The setting in the Keep Disabled Picklist Value On Update check box on the company profile determines whether a disabled picklist value can remain on a record when the record is updated through the user interface. For more information about how this setting affects the behavior for disabled values in picklist fields, see About the Keep Disabled Picklist Value on Update Setting (on page 1256).

Before you begin. To perform this procedure, your role must include the Customize Application privilege. In addition:

- To add or change values in the Status picklist for the Activity record type, your role must include the Customize Application - Edit Activity ‘Status’ Picklist privilege.
- To add or change values in the Status picklist for the Service Request record type, your role must include the Customize Application - Edit Service Request 'Status' Picklist privilege.

To change picklists

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Field Management section, click the required Field Setup link.
5. In the *record type* Fields page, click the Edit Picklist link for the field whose values you want to customize.
6. In the Edit Picklist window, perform the following steps as necessary to meet your requirements:
   - To change an existing value, enter the new value in the Picklist Values field, or disable the old value and create a new value.

     NOTE: If you want this updated name to appear in the picklists for other activated languages, select the Mark for Translation check box. In the other languages, this updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be

translated.
If you do not select Mark for Translation, the other picklist values are unaffected by the change you made here.

You can also add a description for each picklist value.

- To add a new value, enter the information in the row that appears at the bottom of the list.

  To add further new values, click Save & New.

  New picklist values you add automatically appear in blue text and brackets in the other activated languages (regardless of the setting of the Mark for Translation check box). If you enter a description for a value, then the description also appears in blue text and brackets.
- To delete a value, select the Disabled check box. To hide or show disabled values, click Hide Disabled and Show Disabled respectively.

  CAUTION: When you disable values, you also hide the translated versions in other languages.
- To arrange the order in which the picklist values appear, change the numbers in the Order column.

  TIP: Consider entering numbers with gaps between them, such as 10, 20, 30, and so on. This allows you to add new values in the middle of the picklist more easily, without reordering the entire list.
- To arrange the picklist values in alphabetical order for the current language only, click the Save & Order Alphabetically button.
- To arrange the picklist values in alphabetical order for all languages, click the Save & Order Alphabetically For All Languages button.

7. In the Edit Picklist window, click Save & Close.
8. To manually enter the translated equivalent of a new picklist value or the description of a value:
   a. On the Fields page, select the language from the Translation Language drop-down list.
   b. Click the appropriate Edit Picklist link.
   c. Enter the translated equivalent and click Save.

   NOTE: To help you identify the picklist value when you are editing, the application displays the internal ID and the language-specific default value. If you edit the wrong picklist value, the picklist becomes out of sync across languages. When using dynamic layouts, you cannot use picklist values that are identical to internal picklist IDs as this can result in unpredictable behavior.

About the Keep Disabled Picklist Value on Update Setting

The setting in the Keep Disabled Picklist Value On Update check box on the company profile determines the following:

- Whether a disabled picklist value can remain in a field on a record when a user updates the field inline or edits the record through the user interface.
- Whether the Import Assistant can update a multi-select picklist field with a list of values that includes one or more disabled values that are already selected in the field.

How the Setting Affects Updates in the User Interface

If the Keep Disabled Picklist Value On Update check box on the company profile is not selected, then when a user edits a record that contains a disabled value in a picklist field through the user interface, the behavior is as follows:

- If the user edits the picklist field inline, then the disabled value is no longer available for selection in the field.
- If the user opens the record in a record Edit page that displays the picklist field, then the disabled value is removed from the field and is no longer available for selection. If the field that contained the disabled value is the parent in a cascading picklist, then the related picklist field is also cleared.

In both of these cases, if the user cancels the operation without saving any changes, then the disabled value remains in the field, and if the field is the parent in a cascading picklist, then the existing value in the related picklist field is unchanged.

If the Keep Disabled Picklist Value On Update check box on the company profile is selected, then when a user edits a record that contains a disabled value in a picklist field through the user interface, the behavior is as follows:

- If the user edits the picklist field inline, then the disabled value that was previously selected is still available for selection in the field, as well as any active values. The disabled value appears last in the list of values that can be selected for the field. However, if the user removes the disabled value from the picklist field, then after the user saves the update, the disabled value is no longer available for selection in the field.
- If the user opens the record in a record Edit page that displays the picklist field, then the disabled value is not removed from the picklist field, even if the user edits other fields in the record and save the updates. If the user edits the field that contains the disabled value, then the disabled value is still available for selection, as well as any active values. The disabled value appears last in the list of values that can be selected for the field. If the user removes the disabled value from the field, then after the user saves the update, the disabled value is no longer available for selection in the field.

  If the field that contains the disabled value is the parent in a cascading picklist, then in the related picklist, only the value that was previously selected is available. If the user selects a new value in the parent picklist, then the values that are associated with the new parent value become available in the related picklist.

How the Setting Affects Updates from Other Channels

For updates to records from other channels, the setting in the Keep Disabled Picklist Value On Update check box on the company profile is considered only in the case where the Import Assistant attempts to update a multi-select picklist field with import data that contains one or more disabled values. If the check box is not selected, then the multi-select picklist field is not updated. However, if the Keep Disabled Picklist Value On Update check box is selected, then the following happens:

- If all of the disabled values in the import data are already selected in the record, then the field is updated and the disabled values remain in the list of values.
- If the import data contains at least one disabled value that is not already selected in the field, then the field is not updated.

Note that the setting in the Keep Disabled Picklist Value On Update check box on the company profile is not considered in the following cases:

- When a record is updated through Web services, or a JavaScript API method, or a REST API request, and a disabled value is included in the import data for a multi-select picklist field. In this case, the disabled value is always imported.
- When a record that contains a disabled value in a single-value picklist field is updated through any channel other than the user interface. In this case, the disabled value is never removed from the field on the record unless a new, active value, or a null value is specified for the field in the import data.

By default, the Keep Disabled Picklist Value On Update check box on the company profile is not selected, but your administrator can change this setting.

Mapping Picklist Values to Picklist Value Groups

For many record types, you can map the values in the picklist fields to one or more picklist value groups. Picklist value groups limit the values that are available for users to select in picklist fields. Each picklist value group can control one or more picklist fields on one or more record types. For more information about picklist value groups, see About Picklist Value Groups (on page 1329).

When mapping the values in a picklist field to the picklist value groups, you can do the following:

- Map some, none, or all of the values to a given picklist value group.

- Map each value to one or more picklist value groups, or to no picklist value group.

To map picklist values to picklist value groups

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Types Setup section, click the link for the required record type.
4. In the Field Management section, click *record type* Field Setup.
5. In the *record type* Fields page, click the Edit PVG link for the picklist that you want to map to one or more picklist value groups.
6. In the PVG Mappings Setup pages, in step 1, do the following:
   a. In the Picklist Value Group section of the page, select a picklist value group.
   b. Use the arrows to move the values that you want to map to the selected picklist value group from the Picklist Available Values list to the Values Related to Selected PVG list.
   c. Repeat steps a and b for each picklist value group that you want to map to the field.
7. When you finish mapping the values to the picklist value groups, go to Step 2 in the PVG Mappings Setup pages and confirm your mappings.
8. Click Finish to save your changes.

Related Topics

See the following topics for related information:

- Considerations When Setting Up Picklist Value Groups (on page 1330)
- Process of Setting Up Picklist Value Groups (on page 1330)
- Creating Picklist Value Groups (on page 1331)

Customizing Related Item Layouts

You can customize page layouts to improve the look-and-feel of Oracle CRM On Demand. The layout functionality for related items allows you to customize a related-list layout for most record types to show the specified fields. You can select fields from related lists and some parent fields. You can select which fields that you want to appear, and you can specify the order of the fields that meets your business needs. However, you cannot select the number of rows that are displayed.

For certain related items, you can optionally select any field that is available in the Sort by drop-down list and specify the sort order (ascending or descending) for the records. For a list of these related items and details of the fields that you can select for sorting, see Support for the Sort Feature for Related Items (on page 1262).

CAUTION: Specifying a sort field can affect performance.

NOTE: You cannot customize the layout for the Teams related information section for most of the record types that support teams.

If the Enable Enhanced View for Tabs option is selected on the company profile, then you can specify custom default filters for the related information sections that support the enhanced view. For more information, see Managing Default Filter Criteria for Related Items (on page 1264).

List Add Feature

If the related information section supports the List Add feature, then the Enable List Add check box is available in Step 2 of the Related Information Layout Wizard. If you select this check box, then users can 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 Support for the List Add Feature (on page 1260).

NOTE: The Enable List Add check box is not available in the Recipients related information layout for the Campaign record type and the Invitees related information layout for the Event record type. The List Add feature is always enabled in these related information sections, and you cannot disable it.

Note the following points regarding the List Add feature:

- The List Add feature does not support the creation of integration events through workflow actions. Similarly, the List Add feature does not support modification tracking. If your company needs to create integration events when records are linked or unlinked, or needs to track run-time modifications to records, then do not enable the List Add feature.
- The following requirements apply except in the case of the related information sections for Custom Objects 01 through 03:
  - If there are any required fields on the relationship between the main record and the linked record other than the field that creates the relationship between the records, then for the List Add feature to work, you must specify a default value for those required fields. For example, on the relationship between a certification record and a related certification record, Relationship is a required field. If a user clicks Add to link a single related certification record to a certification record, then the user can select a value for the Relationship field. However, if the user clicks List Add to link multiple related certification records to the certification record at one time, then the user cannot select a value for the Relationship field. If you do not specify a default value for the Relationship field in the Related Certification record type, then the user sees an error message when they try to link related certification records to a certification record using the List Add feature.
  - The access profiles for the users who use the List Add feature must allow the users the appropriate level of access to the related record types. If the related record type is an intersection between the main record type and another primary record types, and if the intersection between the record types is exposed, then you must give the user read access to the second primary record type in the related information access settings for the main record type. For example, in the Accreditation Certification record type, the intersection between the Accreditation and Certification record types is exposed. Therefore, for the List Add feature to work in the Accreditation Certification related information section on an accreditation record, users must have read access to the related Certification record type on the Accreditation record type.
- The search layout for the related record type determines which fields are shown in the list of records that opens when a user clicks List Add in a related information section. For more information, see Managing Search Layouts (on page 1296).

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

The following procedure describes how to customize the related item layout.

To customize the related item layout

1. In the upper-right corner of any page, click the Admin global link.
2. Click Application Customization.
3. In the Record Type Setup section, click the link for the record type that you want.
4. In the Page Layout Management section, click the Related Information Layout link that you want for the record type that you selected.

   The Related Information Section page appears.
5. In the Related Information Setup section, select the related information type that you want to customize.

   The Related Information Layout page for the selected related information type appears.

   NOTE: The items in the Related Information Setup section vary depending on which record type you select.
6. Do one of the following:
   - Click Edit to modify an existing layout.

- Click New Layout to create a new layout.
- Click Copy to copy an existing layout.

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

7 In Step 1 Layout Name, enter a name for the layout and a description (optional), and click Next.

8 In Step 2 Field Setup, select fields from the available Fields list, and click the up and down arrows, next to the Selected Fields list, to organize the fields in the order that you want.

The maximum number of fields for a layout is 20. If you select more than 20 fields, then an error appears when you try to save the layout.

9 (Optional) If the Sort by option is available, then you can select a sort field and specify whether the records are to be sorted in ascending or descending order.

NOTE: If you do not select a sort field, then the default sort field and sort order are used.

The sort criteria apply both where the related information sections are displayed as tabs and where they are displayed as lists. The field selected in the Sort by drop-down list is used for sorting even if that field is not available in the Selected Field list. For example, if you select Created: Date in the Sort by drop-down list for the Opportunities related information section, then all opportunities are sorted by created date, even if the Created: Date field is not available in the Selected Fields list.

10 (Optional) If you want to allow users to add multiple related records to the related information section at one time, then select the Enable List Add check box.

11 Click Finish.

Support for the List Add Feature

The List Add feature allows users to add multiple records to a related information section at one time. The following table lists the related information sections that support the List Add feature.

Parent Record Type	Related Information Sections
Account	Account Events
Accreditation	- Accreditation Certifications - Accreditation Products - Accreditation Product Product Categories - Accreditation Solutions - Related Accreditations
Business Plan	- Plan Contacts - Plan Opportunities
Campaign	- Partner Campaigns - Recipients
Certification	- Accreditation Certifications - Certification Courses - Certification Exams - Certification Product Product Categories - Certification Products - Certification Solutions - Related Certifications
Contact	- HCP Contact Allocations - Plan Contacts

Parent Record Type	Related Information Sections
Course	■ Certification Courses ■ Course Partners ■ Course Product Product Categories ■ Course Products ■ Course Solutions ■ Related Courses
Custom Objects 01, 02, and 03	■ Accounts ■ Campaigns ■ Contacts ■ Dealers ■ Events ■ Funds ■ Households ■ Leads ■ Opportunities ■ Partners ■ Portfolios ■ Vehicles
Deal Registration	Deal Registration Product Revenues
Event	■ Account Events ■ Invitees ■ Lead Events ■ Opportunity Events
Exam	■ Certification Exams ■ Exam Partners ■ Exam Product Product Categories ■ Exam Products ■ Exam Solutions ■ Related Exams
Financial Account	Financial Account Holdings
Financial Product	Financial Account Holdings
Lead	Lead Events
Opportunity	■ Opportunity Events ■ Plan Opportunities
Partner	■ Course Partners ■ Exam Partners ■ Partner Campaigns
Sample Request	Sample Request Items

Parent Record Type	Related Information Sections
Solution	- Accreditation Solutions - Certification Solutions - Course Solutions - Exam Solutions

For information about enabling the List Add feature, see Customizing Related Item Layouts (on page 1258).

Support for the Sort Feature for Related Items

The following table shows the parent record type and related item combinations for which you can optionally select a sort field and specify the sort order (ascending or descending). The table also lists the fields that are available for you to select.

Parent Record Type	Related Item	Sort Fields
Account	Assets	- Product Name - Serial # - Status
	Completed Activities	Due Date
	Contacts	- Last Name - Primary Contact
	Open Appointments	Start Time
	Opportunities	- Close Date - Created: Date - Modified: Date - Opportunity Name
	Service Requests	- Created: Date - Service Number
Campaign	Opportunities	- Close Date - Created: Date - Modified: Date - Opportunity Name

Parent Record Type	Related Item	Sort Fields
Contact	Accounts	■ Last Name ■ Primary Contact
	Assets	■ Product Name ■ Serial # ■ Status
	Completed Activities	Due Date
	Open Appointments	Start Time
	Opportunities	■ Close Date ■ Created: Date ■ Modified: Date ■ Opportunity Name
	Service Requests	■ Created: Date ■ Service Number
Custom Objects 01 through 03	Assets	■ Product Name ■ Serial # ■ Status
	Opportunities	■ Close Date ■ Created: Date ■ Modified: Date ■ Opportunity Name
Custom Objects 04 through 40	Assets	■ Product Name ■ Serial # ■ Status
Dealer	Contacts	■ Last Name ■ Primary Contact
	Opportunities	■ Close Date ■ Created: Date ■ Modified: Date ■ Opportunity Name
Objective	Opportunities	■ Close Date ■ Created: Date ■ Modified: Date ■ Opportunity Name

Parent Record Type	Related Item	Sort Fields
Opportunity	Assets	Product Name Serial # Status
	Completed Activities	Due Date
	Contacts	Last Name
	Open Appointments	Start Time
	Sub-Opportunities	Close Date Created: Date Modified: Date Opportunity Name
Partner	Contacts	Last Name Primary Contact
Partner Program	Opportunities	Close Date Created: Date Modified: Date Opportunity Name
Service Request	Completed Activities	Due Date
	Open Appointments	Start Time

Managing Default Filter Criteria for Related Items

If the Enable Enhanced View for Tabs option is selected on the company profile, then you can specify custom default filters for the related information sections that support the enhanced view. If you define a filter for a related information section, then the filter is applied when a user opens the parent record Detail page, if both of the following are true:

- The user uses the tab format for the related information sections.
- The field that is used for the filter is an available search field in the search layout that is assigned to the user's role for the related record type.

Users can clear the default filter. However, after a user navigates away from the record Detail page and then returns to it, the custom default filter is applied again.

When specifying the criterion for a custom default filter, note the following considerations:

- Only one filter can exist for a related record type for a given parent record type. You cannot specify different filters for the individual layouts for a related record type.
- A filter can affect performance when a user opens the related information tab, and can affect performance when a user opens the record Detail page, if the related information section is the first tab on the Detail page.
- If the field that you select for the filter is not in a layout for the related information section for the record type, then the field is added to the related information section at run time, provided that the filter field is an available search field in the search layout for the related record type in the user's role.

- Certain fields are optimized to improve performance during searches and when sorting lists. These optimized fields are shown in green text in the list of fields that are available for use as the filter field. As a best practice, use one of these fields for the filter.
- If the field that you select for the filter is not a picklist field, then the filter value that you enter is stored in your user language and it is not translated. When a user opens the list of related records, the records are filtered on the value that you entered for the filter, regardless of the language of the user who opens the filtered list. For information about using picklist fields in default filter criteria, see the About Picklist Fields in Default Filter Criteria section of this topic.
- If you use a field whose format is dependent on the locale of the current user for the filter, then the search returns the records that match the filter value, regardless of the format. For example, if you use a date field for the filter, then the search returns the records where the date in the filter field matches the date that you specify, regardless of how that date is formatted for the user who views the list of related records.
- The search for records that meet the filter criterion is case-sensitive.

About Picklist Fields in Default Filter Criteria

If you select a picklist field for the filter, and if the filter condition requires one or more values to be specified, then you can use the lookup icon (magnifying glass) to select the values, or you can enter the values directly.

For the Equal to, Contains all values, Contains none of the values, and Not equal to conditions, the following behavior applies when you specify the filter criterion:

- If you use the lookup icon to select a picklist value, or if you enter a value that matches an existing picklist value in your language exactly, then the language independent code (LIC) of the picklist value is saved for the search. When a user opens the list of related records, Oracle CRM On Demand compares the LIC that was saved with the LICs of the picklist values, and the corresponding picklist value for the LIC in the user's language is used to filter the list of related records.
- If you enter a value that does not match an existing picklist value in your user language exactly, then the value that you enter is saved for the search. The value is saved in your user language. When a user opens the list of related records, Oracle CRM On Demand compares the value that you entered with the LICs of the picklist values. The records are filtered on the value that you entered for the filter, regardless of the language of the user who opens the filtered list.

For the Between, Greater than, and Less than conditions, the value that you enter or select for the filter is saved for the search. The value is saved in your user language. For these conditions, Oracle CRM On Demand compares the value that you enter with the LICs of the picklist values.

For the Contains at least one value condition, the values that you enter or select for the filter are saved for the search. The values are saved in your user language. For this condition, Oracle CRM On Demand compares the value that you enter with the picklist values, and not the LICs of the values. Therefore, using the Contains at least one value condition for a default filter might result in unpredictable behavior for users who have a different user language.

You can find more information about filter criteria and filter values in the following topics:

- About Filter Conditions (on page 77)
- About Filter Values (on page 81)
- About Searching on Multi-Select Picklists (see About Searching on Multi-Select Picklists on page 83)

The following procedure describes how to specify the criterion for a custom default filter for a related record type.

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

To specify the criterion for a custom default filter for a related record type

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

3 In the Record Type Setup section, click the link for the parent record type.

For example, if you want to specify a filter for the list of records in a related information section in a Call Detail page, then click Activity.

4 In the Application Customization page for the record type, in the Page Layout Management section, click the Related Information Layout link for the relevant record type.

For example, if you want to specify a filter for the list of records in the Contacts related information section in the Call Detail page for accounts, then in the Activity Application Customization page, click Account Call Related Information Layout.

5 In the title bar of the Related Information Setup page, click Manage Default Filter Criteria.

6 In the Default Filter Criteria page for the parent record type, do one of the following:

   a If a filter does not already exist for the related record type, then click New Default Filter Criteria.

   b If a filter already exists for the related record type, then select an option from the record-level menu for the filter, as follows:

      - If you want to edit the filter, then select Edit.
      - If you want to delete the filter, then select Delete.

7 If you are setting up a filter for the related record type for the first time, then in the Related Record Type field in the Default Filter Criteria Edit page, select the related record type.

Only the related record types that do not already have a default filter defined for them are available for you to select.

NOTE: When you edit an existing custom default filter for a related record type, you cannot select a different related record type in the Related Record Type field. To create a filter for a different related record type, you must create a new filter.

8 In the Default Filter Criteria section, select the field for the filter, then select the filter condition, and then select or enter the filter value.

9 Save your changes.

About Custom Layout Limits

Certain limits apply to the following layout types:

- Static page layouts
- Dynamic page layouts
- Homepage layouts
- Search layouts

For the static, dynamic, and Homepage layout types, the maximum number of characters (including spaces) that you can use in a custom layout name is 50. For the search layout type, the maximum number of characters (including spaces) that you can use in a custom layout name is 30.

Do not use more than a total of 30,000 characters in total in the layout names of a given type for a record type, including the default layout if one exists. Otherwise, the Role Management Wizard does not work correctly. This limit determines the number of custom layouts that you can create. When the layout names are stored in Oracle CRM On Demand, they are separated by a comma so that the total number of characters required to store a layout name is:

1+(*length of layout name*)

In this case, *length of layout name* is the number of characters in the layout name.

To estimate how many layouts of a given type that you can create for a record type, determine how many characters you will use in a typical layout name, and then apply the following formula:

30000/[1+(*length of layout name*)]

In this formula, *length of layout name* is the number of characters in a typical layout name.

For example, if your company typically uses 29 characters in each custom static page layout name for the Account record type, then approximately 1000 static page layouts can be stored for the Account record type, that is, 30,000 divided by 30. However, the characters used in the name of the default static page layout for the record type are counted as part of the overall limit. Therefore, the number of custom static page layouts that can be stored for the Account record type in this example is 999 or fewer, depending on the length of the name of the default page layout.

Similarly, if your company uses 29 characters in each Homepage layout name for the Account record type, then the number of custom Homepage layouts that can be stored for the Account record type is approximately 999, depending on the length of the name of the default Homepage layout for the Account record type.

Customizing Static Page Layouts

The right look and feel of an application is important for user adoption, and one way to achieve the right look and feel is by customizing page layouts. As part of the customizing process, you can:

- Add custom fields to the Edit, Detail, and Create forms.
- Make fields required on the Edit and Create forms.
- Add or hide sections on the Detail pages.

  You can make sections unavailable (hidden) to your employees or you can make them available but hide them initially.

There are two methods of customizing page layouts. You can define static page layouts defining specific fields by role, or dynamic page layouts that change based on the type of record being created. Dynamic page layouts can also be assigned by role. The number of characters that you can use in page layout names is limited. For more information, see About Custom Layout Limits (on page 1266).

You can create new layouts for each record type and then assign a page layout for each record type to a user role. When a user with that role signs in, the user then sees any customized layout specific to each record type. For example, you can create two page layouts for opportunities: one simplified layout for service representatives showing only the most important fields and another layout for field sales representatives showing many more fields, and assign the different layouts to the different roles. Users who are not assigned the service representative or field sales representative roles continue to see the default layout for the Opportunity page. As another example, you can create two page layouts for contacts, such that the Account field is required when service representatives add new contacts, but not required when service managers add new contacts.

If you do not assign a custom page layout for a record type for a given role, the default page is used for that record type.

When customizing a page layout, you can determine:

- Which fields appear on the page

  For custom fields to appear, you must add them to the page layouts. After that, users with roles to which the custom page layout is assigned will see the fields on the Edit page, Detail page, and Create form (in the Action bar).
- Where fields appear on the page
- Which fields are required
- Which fields are read-only
- Which fields must always appear on the layout, even if users personalize their field layout
- How many page sections appear and with which headings.
- Which linked record types are displayed in the related information sections on the Detail page.

  For example, you might want linked contacts to appear on the Accounts Detail page.

- Which layout is used for each related information section.
- Which layout is used in the new record page when users create records from a list of related records of a given record type, provided that the related record type supports custom layouts for new record pages.

  There are some exceptions for this feature. For example:

  - Although you can select a layout for the new record pages for the Open Appointments and Open Tasks related information sections, these layouts will not be used when users create new appointments or new tasks from an Open Activities related information section.
  - You cannot select a layout for the new record page for the Log a Call button on a list of completed activities.
  - Users cannot create new records from some related information sections, such as the Audit Trail section. Therefore, you cannot select a layout for creating new records from those related information sections.

  NOTE: You can also assign a layout for the new record page for each record type in the Role Management Wizard. For information about how Oracle CRM On Demand determines which layout is used in the new record page when users create records from a list of related records, and for details of how to create such layouts, see Customizing Page Layouts for Creating New Records (on page 1274).

You can copy standard layouts, but you cannot edit or delete them. You can delete custom layouts, unless it is already assigned to a role or a dynamic layout.

About Personalizing Page Layouts

Users can personalize the layout of the related information sections on the Detail page for a record type if the Personalize Detail Page - Related Information privilege is enabled for their user role.

Users can personalize the field layout on the Detail page for a record type when their user role is set up as follows:

- The Personalize Detail Page - Fields privilege is enabled for the role.
- A custom page layout is assigned to the role for the record type.

For more information about personalized page layouts, see the following topics:

- How Personalized Related Information Layouts Interact with Page Layouts for Roles (on page 1318)
- How Personalized Field Layouts Interact with Page Layouts for Roles (on page 1322)

Considerations for Fields in Page Layouts

When you design your page layouts, consider the following:

- Some record fields are important to report and forecast calculations. To enforce the consistent use of these fields, they are flagged as required. You cannot change the required flag on these fields when customizing a page layout. You also cannot remove them from a page layout.
- Removing fields from a page layout can have important implications for how the records are used. For example, if you remove the Status and Publish fields on solutions records, employees with that page layout cannot approve solutions or make them available to others.
- Addresses are grouped together so that the field and their labels reflect the naming convention for each country. Therefore, for some record types, you cannot separate out individual address lines. Instead, you must select the field that includes the group of address lines (a single address option). This option replaces the individual fields that you could select in releases earlier than Release 20, such as Street, City, Zip Code. For example, for leads, the field Billing appears on the Field Setup and Field Layout steps of the Page Layout assistant. The Billing field includes all the Billing Address fields.
- You can move standard and custom note fields in the Long Text Field(s) list on your page layout to other areas in your page layout.
- You can move the following fields to and from the Long Text field(s) list, and to and from other areas, in your page layout:

Record	Field Name
Account Address	Description
Address	Description
Address	Comments
Sales Assessment Template	Description
Activity	Next Call
Application	Existing Partnerships
Application	Expected Partnership Benefits
Application	Indexed Long Text
Asset	Description
Book	Description
Dealer Address	Description
Event	Description
Event	Session Details
Event	Test Objective
Fund	Description
Fund Request	Description
Household	Description
Invitee	Comments
Invitee	Session Detail
Messaging Plan Item	Synopsis
Messaging Plan Item	Speaker Notes

Record	Field Name
Messaging Plan Item	Audience
Messaging Plan	Audience
Messaging Plan	Comment
Messaging Plan	Description
Messaging Plan Item Relations	Audience
Messaging Plan Item Relations	Synopsis
Objective	Description
Objective	Target Audience
Account Call	Next Call
Account Call	Description
Appointment	Next Call
Appointment	Description
Attendee Call	Next Call
Attendee Call	Description
Contact Address	Acceptable Schedules
Contact Address	Description
Contact Call	Description
Contact Call	Next Call
Smart Call	Description
Smart Call	Next Call

Record	Field Name
Task	Description
Task	Next Call
Partner	Description
Partner Address	Description
Partner Program	Description
Product	Description
Product Indication	Description
Revenue	Description
Account Revenue	Description
Contact Revenue	Description
Opportunity Product Revenue	Description
Sample Disclaimer	Disclaimer Text
Sample Lot	Description
Sample Transaction	Comments
Service Request	Subject
Transaction Item	Description
Vehicle	Description
Vehicle Service History	Description

Page Layouts and Lists

You can use page layouts and role privileges to limit the fields that users can search, view in lists, and export. When a user creates or refines a list of records or uses advanced search to find records, the privileges and page layouts assigned to the user's role determine which fields the user can search and view.

If the All Fields in Search and Lists privilege is enabled for the user's role, then the user can search all of the search fields that are made available in the search layout that is assigned to the user's role for the record type. Also, when creating or refining a list, the user can select any field to display it as a column in the list of records that is returned by the search.

NOTE: It is recommended that company administrators do not enable the All Fields in Search and Lists privilege for most user roles. When the privilege is not enabled, fields that your company does not use are not visible in search and list pages. This reduces clutter and makes it easier for users to see the fields that they are most interested in.

If the All Fields in Search and Lists privilege is not enabled for the user's role, then the user can search a field only if it meets both of the following criteria:

- The field is an available search field in the search layout that is assigned to the user's role for the record type.
- The field is displayed on the Detail page layout that is assigned to the user's role for that record type. If dynamic page layouts are defined for the role, then the field must be displayed on at least one of the dynamic page layouts.

Also, when creating or refining a list, the user can select a field to display it as a column in the list of records that is returned by the search only if the field is displayed on at least one of the Detail page layouts, including dynamic page layouts, that are assigned to the user's role for the record type. This restriction also affects what the user can export in a list. If the List - Export Displayed Fields privilege is enabled on the user's role, but the List - Export All Fields privilege is not enabled, then the user can export only the fields that are displayed in the list. The user cannot export all fields on the records in the list.

NOTE: In the case of advanced searches that users start from the Advanced link in a list of related records on a parent record, additional considerations apply to the availability of search fields and the fields that can be displayed in the search results. For more information, see About Advanced Search of Related Records (on page 95).

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

To create a page layout

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Page Layout section, click the required Page Layout link.
5. In the Page Layout list, do one of the following:
   - Click the Edit link for an existing layout to modify it.
   - Click the New Layout button to create a new layout.
   - Click the Copy link to copy an existing layout.

   The Page Layout Wizard appears to guide you through the process.

   NOTE: The number of steps in the Page Layout Wizard can differ depending on the Page Layout link you click.
6. In Step 1 Layout Name, enter a name for the layout and a description (optional).
7. In Step 2 Field Setup, select the field characteristics, as follows:
   - Select the Required check box for any fields that you want to make required.

     NOTE: Users are not compelled to select a field of type Checkbox that is marked as Required. If you want the check box field to have a value of True (that is, you want the check box to be selected), then you must use field validation rules on the check box field. For more information, see About Field Management (on page 1201).

- Select the Read Only check box for any fields that you want to make read only.
- Select the Always On Layout check box for any fields that you do not want users to be able to remove from their layout.

  NOTE: When you create a new page layout, the Always On Layout check box is selected by default and is read-only for any field that is configured as a required field, unless a default value is configured for the field. If a default value is configured for a required field, then the Always On Layout check box is selected, but you can deselect it. It is also recommended that you select the Always On Layout check box for any fields that are configured as conditionally required. And, if you use or plan to use a dynamic page layout for the record type, then it is recommended that you select the Always On Layout check box for the picklist field that drives the dynamic layout.

For information about the Conditionally Required check box, see About Conditionally Required Fields (on page 1217).

8 In Step 3 Field Layout, you can:

- Move fields from the *record type* Available Fields list to various sections of the *record type* Arrange Page Layout area.

  Make sure you move the custom fields and the industry-specific fields you want to add to the forms. Also, if any of the fields for which you selected the Always On Layout check box in Step 2 are not already on the layout, then add them to the layout.

  CAUTION: Unless a default value is configured for a required field, the required field must be on the page layout. Otherwise, anyone with that layout will be unable to create or edit a record of that type. If a default value is configured for a required field, then the required field can optionally appear on the page layout. Similarly, you must make sure that any conditionally required fields are on the relevant page layouts. Otherwise, users will not be able to enter a value for those fields when they become required.

- Remove the Description field from your page layout or move the Description field to another area on your page layout.
- Rearrange the information.

NOTE: These changes affect all the forms for that record type when a user with an appropriate role views the pages. However, if you update the field layout after a user personalizes the field layout for the record type, then the changes do not apply to the personalized layout. Some fields include a group of fields or multi-line fields. Avoid moving those fields around because the information itself might overlap other fields in the final layout. For this reason, the application does not allow you to move multi-line text fields, such as Description. The application uses an address template that provides the fields specific to each country. For more information, see About Countries and Address Mapping (on page 1615).

9 In Step 4 Related Information, you can:

- Add sections or remove sections that appear on the Detail pages. The sections are the areas where users can link records to the current record.

  For example, if you do not want employees to be able to link products to opportunities, make sure the Products section does not appear in the Displayed or Available Information box.

  NOTE: Users can change these default settings through the Edit Layout link on the Detail page for their application. After users have edited their personal layouts, they do not see new changes to the related information made by the company administrator until they edit their layout another time.

- Change the order of the sections on the Detail pages.

NOTE: These changes affect the Detail pages for that record type when a user with an appropriate custom role views the pages.

10 (Optional) In Step 5 Related Information Layout, you can:

- In the Related Information Layout field, select the appropriate related information layout for each of the related information sections on the page.

NOTE: The default layout for each related information section is the standard one. If you have created custom related information layouts already, you can select them from the list. For more information about creating related information layouts, see Customizing Related Item Layouts (on page 1258).

- In the New Record Layout Name field, select a layout to be used in the new record page when users create records from a list of related records, for each of the related record types that support custom layouts for new record pages.

  Administrators can create custom layouts for new record pages. If any custom layouts for new record pages have been created for the related record type, then you can select a custom layout from the list.

11 Click Finish.

12 Assign the page layout for this record type to user roles as required, see Adding Roles (on page 1396).

Customizing Page Layouts for Creating New Records

For many record types, you can create and customize page layouts to be used in the pages where users enter information for new records. For these layouts, you can improve the look-and-feel of Oracle CRM On Demand, allowing users to view only the most relevant and the most frequently used fields for a record type.

In the New Record Layout page you can select which fields appear in the layout, which fields are required, which fields are read-only, and you can rearrange the order of the fields in the layout to meet your business needs.

You can copy or edit an existing layout and then modify it to your requirements.

NOTE: The number of characters that you can use in layout names is limited. For more information, see About Custom Layout Limits (on page 1266).

After you create a layout for a new record page, you can use the Role Management Wizard to assign the layout to the user roles that need to use that layout. When you do so, you can also optionally specify that the layout is to be used only when a user creates a record through the Action bar or the global header. For more information about assigning layouts for new record pages to roles, see Adding Roles (on page 1396).

Layouts for New Record Pages for Related Information Sections

In addition to assigning layouts for new record pages to roles, you can also use the Page Layout wizard to assign layouts for creating records from a list of related records. For example, if you want users to see one layout when they create a lead from the list of related leads on the Account Detail page, and a different layout when they create a lead from the list of related leads on the Contact Detail page, then you can create two custom layouts for new record pages for the Lead record type, and assign the one of the layouts to the Leads related information section in the Detail page layout for the Account record type and the other layout to the Leads related information section in the Detail page layout for the Contact record type.

The following table shows how Oracle CRM On Demand determines which layout is to be used in the new record page when users create records of a given record type from a list of related records.

Custom New Record Page Layout is Selected for the Related Record on the Page Layout for the Main Record	Custom New Record Page Layout is Selected for the Related Record on the Role	Quick Links Only Check Box is Selected for the Related Record on the Role	Layout Used for Creating New Related Records
Yes	No	Not applicable	The new record page layout selected for the related record on the page layout for the main record

Custom New Record Page Layout is Selected for the Related Record on the Page Layout for the Main Record	Custom New Record Page Layout is Selected for the Related Record on the Role	Quick Links Only Check Box is Selected for the Related Record on the Role	Layout Used for Creating New Related Records
Yes	Yes	Yes	The new record page layout selected for the related record on the page layout for the main record
Yes	Yes	No	The new record page layout selected for the related record on the page layout for the main record
No	Yes	No	The new record page layout selected for the related record on the role
No	Yes	Yes	The Detail page layout selected for the related record on the role, unless the user has personalized their Detail page layout, in which case the personalized layout is used
No	No	Not applicable	The Detail page layout selected for the related record on the role, unless the user has personalized their Detail page layout, in which case the personalized layout is used

The following procedure describes how to create or modify a layout for creating new records.

To create or modify a layout for creating new records

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Page Layout Management section, click the *record type* New Record Layout link.
5. In the New Record Layout page, do one of the following:
   - Click Edit or Copy to modify an existing layout.
   - Click the New Layout button to create a new layout.

   The Page Layout Wizard appears to guide you through the process.
6. In Step 1 Layout Name, enter a name for the layout, and a description if required.
7. In Step 2 Field Setup, select the field characteristics, as follows:

- Select the Required check box for any fields that you want to make required.

  NOTE: Users are not compelled to select a field of type check box field that are marked as Required. If you want the check box field to have a value of True (that is, you want the check box to be selected), then you must use field validation rules on the check box field. For more information, see About Field Management (on page 1201).

- Select the Read Only check box for any fields that you want to make read only.

For information about the Conditionally Required check box, see About Conditionally Required Fields (on page 1217).

8. In Step 3 Field Layout, you can:
   - Move fields from the Available record type Fields list to various sections of the Arrange *record type* Page Layout area.

     Make sure you move the custom fields and the industry-specific fields you want to add to the page layout.

     CAUTION: Unless a default value is configured for a required field, the required field must be on the page layout. Otherwise, anyone with that layout will be unable to create a record of that type. If a default value is configured for a required field, then the required field can optionally appear on the page layout. Similarly, you must make sure that any conditionally required fields are on the relevant page layouts. Otherwise, users will not be able to enter a value for those fields when they become required.

   - Remove the Description field from your page layout or make sure the Description field is in the Long Text Field(s) section of your page layout.
   - Rearrange the information by moving the fields between sections, as required.

   NOTE: These changes affect all the forms for that record type when a user with an appropriate role views the pages. Some fields include a group of fields or multi-line fields. Avoid moving those fields around as the information itself might overlap other fields in the final layout.

9. Click Finish.

   NOTE: After you add a layout to the application, you need to make it available to a user role before users can see it. For more information on adding and modifying user roles, see Adding Roles (on page 1396).

Renaming Field Section Titles

On the record Edit and Detail pages, fields are grouped into sections. To use terminology that is familiar to your users, you can rename the titles above groups of fields on your Edit and Detail pages. On the Account Homepage, for example, you can change Key Account Information to Account Profile.

You cannot rename sections on the standard layouts. You must create a new one and rename the sections on the custom layout.

Sections with no fields in them do not appear on the Detail page.

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

To rename a section

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Page Layout section, click the required Page Layout link.
5. In the *record type* Page Layout page, click Edit Sections.
6. In the Translation Language drop-down list, select the primary language for your company.
7. In the Display Name, type in the name you want to use.

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

NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated.
If you do not select Mark for Translation, the previous display names remain, unaffected by the change you made here.

9 To manually enter the translated equivalent of the new name:

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

b Enter the translated equivalent in the appropriate Display Name field and click Save.

c Click the link to return to the Fields page you just updated and select the language again, if necessary.

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

About Custom Web Applets

Custom Web applets allow you to embed external Web content, reports, and dashboards in the following places in Oracle CRM On Demand:

- For global Web applets:
  - Action bar

    NOTE: For Release 27 and later, this also can refer to global Web applets in the global header, which can be configured as part of an Action Bar and Global Header layout.

  - My Homepage
- For record type Web applets:
  - Record type homepage
  - Detail page

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (on page 1334).

You can create five types of Web applet, which allows you to embed different types of Web content:

- **Dashboard.** Used to embed dashboards.
- **Feed.** Used to embed RSS feeds. For example, you might want to embed a news feed on My Homepage.

  Note: Only the RSS 2.0 standard is supported.

- **HTML**. Used to embed HTML code. For example, use this Web applet to embed Web widgets from an external source such as Google Maps.
- **Report.** Used to embed reports.
- **URL**. Used to embed the content available at the specified URL in an applet within Oracle CRM On Demand. For example, you might have a custom Web applet on the Lead Details page that allows you to see a Google search on that lead's name. For more information on the standardization of URLs in Oracle CRM On Demand, see About URL Standardization (on page 1324).

  NOTE: Although it is possible to use a URL to embed a report or dashboard in a custom Web applet, Web tab, or Web link of the URL type, this functionality is not fully supported, and the URL might not work after an upgrade. For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 1236).

You can add a Web applet for any record type for which the Page Layout links are visible.

There are two advantages to creating a custom Web applet rather than a custom Web tab:

- A custom Web applet that is displayed on a page, such as Lead Details, allows you to view data on the Details page together with other contextual data. On the other hand, if your external data is viewed using a Web tab, when you click the Web tab, you are directed away from the Details page, and redirected to the Web tab page.
- Your company might have a great deal of information that you want to display, for example, portfolio holdings. Custom Web applets allow you to show a large amount of data from another Web site without requiring you to load information in to Oracle CRM On Demand. Loading large amounts of data in to Oracle CRM On Demand requires integration tools to manage large numbers of data columns.

Custom Web Applet Limits

The maximum number of custom Web applets that can be shown in a layout wizard is 200. This limit applies in the layout wizards for My Homepage, record type homepages and detail pages, and the Action bar. Custom homepage reports are included in the count of custom Web applets for the record type homepage and My Homepage locations.

This limit can affect the layouts that end users see in the application as well as the layout wizards that administrators use to create and edit layouts. If more than 200 custom Web applets are created for a location (that is, for My Homepage, or a record type homepage or detail page, or the Action bar), then the next time that you edit a layout for that location, only the 200 most recently modified custom Web applets are shown in the layout wizard. Any remaining custom Web applets are not shown, even if those applets were previously included in the list of displayed applets or the list of available applets. After you save your changes to the layout, any applet that was not available in the wizard is no longer available for end users whose role has that layout, even if the applet was previously displayed in the layout by default or was available for users to add to their layout.

Related Information

See the following topics for related information:

- Creating Web Applets for Record Types (on page 1279)
- Creating Global Web Applets (on page 1333)
- Creating Dashboard Web Applets (on page 1289)
- Creating HTML Web Applets (on page 1284)
- Creating Report Web Applets (on page 1287)
- Creating RSS Feed Web Applets (on page 1281)
- Creating URL Web Applets (on page 1285)
- Example of Setting Up an RSS Feed Web Applet (on page 1290)
- Translating Web Applet and Custom Report Names (on page 1291)
- About Disabling Customized Code for Users (on page 1278)

About Disabling Customized Code for Users

When you are troubleshooting a technical issue for a user in Oracle CRM On Demand, you might want to disable all customized code, including the customized code in custom Web applets and all custom HTML head additions, for that user. If the issue no longer occurs when the customized code is disabled, then it is likely that the customized code is the cause of the issue. Also, if you contact Oracle for assistance, then you might be asked to disable all customized code to help troubleshoot the issue.

The Customized Code Enablement field in a user's profile allows administrators to disable all of the customized code for that user, and also to enable the customized code indicator for the user. When the customized code indicator is enabled for a user, one of the following messages appears at the bottom of each page that the user accesses in Oracle CRM On Demand:

- **Customized code active.** Customized code is detected and is active in the current page.

- **Customized code not detected.** No customized code is detected in the current page.
- **Customized code disabled.** Customized code is detected for the current page, but the customized code is disabled.

For information about the options that are available in the Customized Code Enablement field, see User Fields (on page 1365).

NOTE: If you add the Customized Code Enablement field to the User Owner page layout for a user role, then users who have that role can disable the customized code and enable the customized code indicator for themselves.

About Customized Code in Source Code

When customized code is active in a page, the customized code is visible in the source code for the page, with comments to mark the start and end of the customized code. When the customized code is disabled, the customized code is not included in the source code for the page. Instead, the source code includes a comment to indicate that the customized code is disabled.

Creating Web Applets for Record Types

You can embed external Web content by creating a custom Web applet that appears on a Homepage or the Detail page for a record type. You can also embed reports and dashboards in custom Web applets for record-type Homepages and Detail pages.

When you create a Web applet, you must add it to the page layout for the Homepage or Detail page. For users to see that page layout, it must be assigned to an appropriate user role.

Before you begin. To perform this procedure, your role must include the Customize Application and Manage Custom Web Applets privileges. If the Enable Language Translation Support for Web Applets check box is selected on the company profile, then you can create applets only if the language that is selected in the Translation Language field is the default language for the company.

To create a new Web applet

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Page Layout Management section, click the required record type Web Applet link.
5. In the *record type* Applet list, click New.
6. On the Web Applet page, complete the following fields.

Field	Comments
Name	Enter a name. The value in the name field appears in the title bar of the Related Information section.

Field	Comments
Mark for Translation	This check box is available only if the Enable Language Translation Support for Web Applets check box is selected on the company profile. When you first create an applet, the Mark for Translation check box is selected and read-only. The Mark for Translation check box is effective only when you update an existing applet. In addition, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Language field in the list of applets before you edit the applet. For more information about translating custom Web applet names, see Translating Web Applet and Custom Report Names (on page 1291). If you change the name of an existing custom Web applet in the default language for the company, then use the Mark for Translation check box as follows: - If you want the translated versions of the name to be replaced by the updated name, then select the Mark for Translation check box. - If you want the translated versions of the name to remain unchanged, then do not select the Mark for Translations check box.
Location	Select Homepage or Detail Page, depending on whether the external content, report, or dashboard is to appear on a homepage or on the Detail page.
Columns	**NOTE:** This field is applicable only when the Location value is Homepage. Specify the width of the applet by selecting single or double from the Columns menu.

Next, complete the fields according to the type of applet you require, as described in the following topics:

- Creating Dashboard Web Applets (on page 1289)
- Creating HTML Web Applets (on page 1284)
- Creating Report Web Applets (on page 1287)
- Creating RSS Feed Web Applets (on page 1281)
- Creating URL Web Applets (on page 1285)

To make the Web applet visible

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Page Layout section, click the required Page Layout link.

5 In the Page Layout list, do one of the following:
   - Click Edit to modify an existing layout.
   - Click New Layout to create a new layout.
   - Click Copy to copy an existing layout.

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

   NOTE: The number of steps in the Page Layout Wizard can differ depending on the Page Layout link you click. In Step 1 Layout Name, make sure the layout has a name, and if required, a description.

6 In Step 4 Related Information:
   a Move the new Custom Web applet from the Available Information list to the Displayed Information list.
   b Click the up and down arrows to position the new custom Web applet, as required.
   c Click Finish to create the new layout.

7 Add the page layout to user roles as required, see Adding Roles (on page 1396).

Related Topic

The following topic provides an example of creating a Web applet that displays a Twitter RSS feed:

- Example of Setting Up an RSS Feed Web Applet (on page 1290)

Creating RSS Feed Web Applets

Create this type of applet for RSS feeds that you want to embed in the application. Configure RSS feed applets so that embedded content is relevant to user roles.

You can allow users to configure RSS feed applets, but it is recommended that you make only a small number of applets configurable. If you add an RSS feed applet to the Action bar, and make the records available in a custom Web tab, users can read the feeds more easily, because they do not have to navigate to a different page.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (on page 1334).

To create an RSS feed applet

NOTE: This is the final step in creating a Web applet, as described in the topics: Creating Web Applets for Record Types (on page 1279) and Creating Global Web Applets (on page 1333).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Type	Select Feed.

Field	Comments

User and System Fields	Before you create a Web applet in Oracle CRM On Demand, carefully consider how you will use parameter field variables such as %%%User Id%%%, if the field contains characters that can be escaped as character entity references.
	
	When you insert parameter field variables in HTML, characters in the field name like & are escaped as the corresponding character entity reference, (in this case &) and the browser expands the entity reference so that the referenced character is displayed. For example, you might want to create a homepage HTML Web applet with the company name: A&B Manufacturing. From the User and System Fields drop-down list, you can choose Company Name to insert the variable: %%%Company name%%% and at run time, this variable has the value A&B Manufacturing, which appears in the browser as A&B Manufacturing. However, character entity references are not expanded in JavaScript code, so in this case, put the variable in a referenceable context, retrieve it from the document DOM, then encode it as necessary. These differences are illustrated in the following example of Web Applet HTML code:
	
	`<span id=”companyname” style=”display:none” data-value=”%%%Company name%%%”></span>`
	
	`<script type=”text/javascript”>`
	
	`var var1 = ”%%%Company name%%%”;`
	
	`var var2 = document.getElementById(“companyname”).getAttribute(“data-value”);`
	
	`</script>`
	
	The value of var1 is “A&B Manufacturing” and the value of var2 is “A&B Manufacturing”. The values of var1 and var2 are different because the browser expands entity references in HTML tags and data, but not within the <script> element.
	
	Select an option from the User and System Fields drop-down list to add parameter fields to the URL field at the current position of the cursor.
	
	For example, if you choose User id from the drop-down list, %%%User id%%% is inserted. At run time, this parameter is replaced with the user ID of the user who is signed in.
	
	As another example, if you choose Host Name from the list, %%%Hostname%%% is inserted at the cursor position. At run-time, this parameter is replaced with the host name of the server where Oracle CRM On Demand is running. This is useful in configurations containing a URL to Oracle CRM On Demand as it is no longer necessary to manually modify the Oracle CRM On Demand host name when migrating from one environment to another.
	
	For more information, see User and System Fields (on page 1242).

Field	Comments
Record Type Fields	**NOTE:** This field is applicable only when the Location value is Detail Page. Place your cursor in the URL field where you want to add a parameter, and then select the field that you want to include from the drop-down list. For example, if you select the field Row id, %%%Row id%%% is inserted. At run-time, this parameter is replaced with the row ID of the current record.
Functions	Select EncodeURL from the picklist if your Oracle CRM On Demand URL requires further encoding to display it correctly.
URL	Enter the URL that is invoked when the user clicks the hyperlink, such as http://rss.news.yahoo.com/topstories. You must include *http://* in the URL. Make sure that the URL is a valid uniform resource identifier (URI). If it is not valid, then an error message is displayed instead of the embedded content when a user accesses the custom Web applet. **NOTE:** For more information on the standardization of URLs in Oracle CRM On Demand, see About URL Standardization (on page 1324). You can also include context-sensitive parameters in this field by placing the cursor in the URL field, and then selecting the User and System Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value, based on the current record when the applet calls the source URL. If you do not specify any URL, the user is directed to a void URL when clicking the link. **NOTE:** Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser.
Let users override URL	Configure RSS feed applets for content that is relevant to user roles. While you can enable users to configure RSS feed applets, it is recommended that you make only a small number of applets configurable.
Open Records in	Select a value depending on whether you want records to open in the current browser window or a new browser window. If you want to add the RSS feed applet to the Action Bar, remember that the feeds are easier to read in a new browser window. In doing this, it prevents the user needing to navigate to a different page.
Height	The height of the applet in pixels.

Field	Comments
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web applet in modern themes. The Modern Icon field is available only for Web applets that you create for record-type Detail pages.

Creating HTML Web Applets

Create this type of applet for embedded content in the HTML code, to which you want to make additions.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (on page 1334).

To create a HTML Web applet

NOTE: This is the final step in creating a Web applet, as described in the topics: Creating Web Applets for Record Types (on page 1279) and Creating Global Web Applets (on page 1333).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Type	Select HTML.
Record Type Fields	**NOTE:** This field is applicable only when the Location value is Detail Page. Place your cursor in the Web Applet HTML field where you want to add a parameter, and then select the field that you want to include from the drop-down list. For example, if you select the field Row id, %%%Row id%%% is inserted. At run-time, this parameter is replaced with the row ID of the current record.
HTML Head Additions	The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web applet. Any code that you add to the Web Applet HTML field is added to the <iframe> element. You can include references to JavaScript files that you embed in the <head> section of the HTML in this field. Referencing JavaScript files on Oracle CRM On Demand pages is not supported. Any content that you enter in this field is added to the <head> tags.

Field	Comments
Web Applet HTML	The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web applet. Any code that you add to the Web Applet HTML field is added to the <iframe> element. Any content that you enter in this field is added to the <body> tags.
Always Run	This check box determines whether the custom Web applet will be executed if the applet is minimized. This check box is available only for Web applets that you create for record-type Detail pages or the Action bar.
Height	The height of the applet in pixels.
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web applet in modern themes. The Modern Icon field is available only for Web applets that you create for record-type Detail pages.

Creating URL Web Applets

Create this type of applet when you want to embed content from a URL in an IFrame.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (on page 1334).

To create a URL Web applet

NOTE: This is the final step in creating a Web applet, as described in the topics: Creating Web Applets for Record Types (on page 1279) and Creating Global Web Applets (on page 1333).

On the Web Applet page, complete the following fields, and click Save.

Field	Comments
Type	Select URL.
User and System Fields	Select an option from the User and System Fields drop-down list to add user parameter fields to the URL field at the current position of the cursor. For example, if you choose User id from the drop-down list, %%%User id%%% is inserted. At run time, this parameter is replaced with the user ID of the user who is signed in. As another example, if you choose Host Name from the list, %%%Hostname%%% is inserted at the cursor position. At run-time, this parameter is replaced with the host name of the server where Oracle CRM On Demand is running. This is useful in

Field	Comments
	configurations containing a URL to Oracle CRM On Demand as it is no longer necessary to manually modify the Oracle CRM On Demand host name when migrating from one environment to another.
Record Type Fields	**NOTE:** This field is applicable only when the Location value is Detail Page. Place your cursor in the URL field where you want to add a parameter, and then select the field that you want to include from the drop-down list. For example, if you select the field Row id, %%%Row id%%% is inserted. At run-time, this parameter is replaced with the row ID of the current record.
Functions	Select EncodeURL from the picklist if your Oracle CRM On Demand URL requires further encoding to display it correctly.
URL	Enter the URL that is invoked when the user clicks the hyperlink, such as http://maps.google.com. You must include the http:// part of the URL. Make sure that the URL is a valid uniform resource identifier (URI). If it is not valid, then an error message is displayed instead of the embedded content when a user accesses the custom Web applet. You can also include context-sensitive parameters in this field by placing the cursor in the URL field, and then selecting the User and System Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value, based on the current record when the user clicks the value. For example, the following URL passes in the shipping address to Google maps: http://maps.google.com/?q=%%%Ship_To_ADDR_Address1%%%,+%%%Ship_To_CITY_City%%%,+%%%SHIP_LIST_USSTATE%%% If you do not specify any URL, the user is directed to a void URL when clicking the link. **NOTE:** Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser.
Always Run	This check box determines whether the custom Web applet will be executed if the applet is minimized. This check box is available only for Web applets that you create for record-type Detail pages or the Action bar.
Height	The height of the applet in pixels.

Field	Comments
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web applet in modern themes. The Modern Icon field is available only for Web applets that you create for record-type Detail pages.

Creating Report Web Applets

Create this type of applet when you want to embed a report. You can specify filters that will be applied to the report at run time.

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 1236).

Before you begin. The report that you want to embed in the Web applet must be stored under Shared Folders, in a folder to which you have access.

To create a report web applet

NOTE: This is the final step in creating a Web applet, as described in the topics: Creating Web Applets for Record Types (on page 1279) and Creating Global Web Applets (on page 1333).

- On the Web Applet page, complete the following fields, and then click Save.

Field	Comments
Type	Select Report.
Path	Click the Lookup icon (magnifying glass), then navigate to the report you require in Shared Folders, and then click OK. The Path field is automatically populated after you select the report.
Display Report Prompts	This check box is available only if you select Report from the Type menu. If you select this check box, then any prompts that are configured for the analysis are displayed in the custom Web applet, and users can filter the analysis. **NOTE:** Report Web applets in the Action bar do not support prompts. Therefore, this check box is not available if you are creating a Web applet of the Report type for the Action bar.

Field	Comments
Parameters	(Optional) Specify the filters that you want to apply to the report at run time. For detailed information about specifying the filters, see About Specifying Filters for Embedded Reports and Dashboards (on page 1237). You can add fields as parameters, as follows: - To include a user or system field in a filter parameter, place your cursor in the Parameters field at the position where you want to add the parameter, and then select the field that you want to include from the User and System Fields list. For information about the user and system fields that you can use in the parameters, see User and System Fields (on page 1242). - (Web applets for record-type Detail pages only) To include a field from the record type in a filter parameter, place your cursor in the Parameters field at the position where you want to add the field, and then select the field from the *record type* Fields list, where *record type* is the name of the record type for which you are creating the applet.
Always Run	This check box determines whether the custom Web applet will be executed if the applet is minimized. This check box is available only for Web applets that you create for record-type Detail pages or the Action bar.
Refresh Link	This check box is available only if you select Report from the Type menu. If this check box is selected, then the Refresh link is available in the custom Web applet and users can refresh the data in the analysis.
Print Link	This check box is available only if you select Report from the Type menu. If this check box is selected, then the Print link is available in the custom Web applet and users can print the analysis.
Export Link	This check box is available only if you select Report from the Type menu. If this check box is selected, then the Export link is available in the custom Web applet and users can export the analysis.
Description	(Optional) Enter a description for the applet.
Height	Enter the height for the applet, in pixels.
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web applet in modern themes. The Modern Icon field is available only for Web applets that you create for record-type Detail pages.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (on page 1334).

Creating Dashboard Web Applets

Create this type of applet to embed a dashboard. You can specify filters that will be applied to the reports in the dashboard at run time.

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 1236).

Before you begin. The dashboard that you want to embed in the Web applet must be stored under Shared Folders, in a folder to which you have access.

To create a dashboard web applet

NOTE: This is the final step in creating a Web applet, as described in the topics: Creating Web Applets for Record Types (on page 1279) and Creating Global Web Applets (on page 1333).

- On the Web Applet page, complete the following fields, and then click Save.

Field	Comments
Type	Select Dashboard.
Path	Click the Lookup icon (magnifying glass), then navigate to the dashboard you require in Shared Folders, and then click OK. The Path field is automatically populated after you select a dashboard.
Parameters	(Optional) Specify the filters that you want to apply to the reports in the dashboard at run time. The filters apply to all of the reports in the dashboard. For detailed information about specifying the filters, see About Specifying Filters for Embedded Reports and Dashboards (on page 1237). ■ To include a user or system field in a filter parameter, place your cursor in the Parameters field at the position where you want to add the parameter, and then select the field that you want to include from the User and System Fields list. For information about the user and system fields that you can use in the parameters, see User and System Fields (on page 1242). ■ (Web applets for record-type Detail pages only) To include a field from the record type in a filter parameter, place your cursor in the Parameters field at the position where you want to add the field, and then select the field from the *record type* Fields list, where *record type* is the name of the record type for which you are creating the applet.
Always Run	This check box determines whether the custom Web applet will be executed if the applet is minimized. This check box is available only for Web applets that you create for record-type Detail pages or the Action bar.
Description	(Optional) Enter a description for the Web applet.

Field	Comments
Height	Enter the height for the applet, in pixels.
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web applet in modern themes. The Modern Icon field is available only for Web applets that you create for record-type Detail pages.

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (on page 1334).

Example of Setting Up an RSS Feed Web Applet

This topic gives one example of setting up an RSS feed Web applet. You might use this feature differently, depending on your business model. This example sets up an RSS feed Web applet in the contact record detail page for users who have the Field Sales Rep role. The Web applet displays the Twitter feed for the contact.

The company administrator sets up the Twitter ID field on the Contact record type and creates the Twitter Web applet. The company administrator then adds the new field and the Twitter Web applet to the page layout for the Field Sales Rep role. Users who have the Field Sales Rep role can then enter the Twitter ID for a contact in the Contact Detail page. When a user (who has the Field Sales Rep role) populates the field with the contact's Twitter ID, the Twitter RSS feed for the contact appears in the Twitter Web applet on the Contact Detail page.

Before you begin. To set up the Twitter ID field, create the Twitter Web applet, and add the field and the applet to the page layout, you must have the Customize Application privilege in your user role.

To create an RSS feed Web applet (Company Administrator)

1 Set up the Twitter ID field on the Contact record type, as follows:
   a In the upper-right corner of any page, click the Admin global link.
   b In the Application Customization section, click the Application Customization link.
   c In the Record Types Setup section, click Contact.
   d In the Field Management section, click Contact Field Setup.
   e On the Fields page, click New Field.
   f In the Contact Field Edit page, enter Twitter ID in the Display Name field, and select Text (Short) in the Field Type field.
   g Save your changes.
2 Click Back to Contact Application Customization.
3 Create the Twitter Web applet, as follows:
   a In the Contact Application Customization page, in the Page Layout Management section, click Contact Web Applet.
   b In the Contact Applet List page, click New.
   c In the Contact Web Applet page, enter the details of the Web applet, as follows:
      - Enter a name for the Web applet, such as Contact Twitter Feed.
      - In the Location field, select Detail Page.
      - In the Type field, select Feed.

- In the URL fields, enter the following: http://twitter.com/statuses/user_timeline.rss?id=%%%stTwitter_ID%%%&count=10
- In the Let users override URL field, select No.
- In the Open Records In field, select Current Window.
- In the Description field, enter a description such as Twitter Feed for Contact.
- In the Height field, enter 200.

NOTE: The URL specifies that 10 lines of the feed are to be shown in the applet on the Contact Detail page (count=10). To show 10 lines, a height of 200 pixels is appropriate for the applet. If you want more than 10 lines of the feed to appear on the Contact Detail page, change the URL accordingly, and increase the height of the applet.

d Save your changes.

4 Click Back to Contact Application Customization.

5 Add the Twitter ID field and the Web applet to the contact page layout for the user role, as follows:

a In the Contact Application Customization page, in the Page Layout Management section, click Contact Page Layout.

b In the record-level menu for the page layout that is assigned to the Field Sales Rep role, click Edit.

c In Step 3, Field Layout, use the arrows to move the Twitter ID field from the Available Contact Fields section to the page section field to appear, for example, the Key Contact Information section.

d In Step 4, Related Information, use the arrows to move the Web applet you created from the Available Information section to the Displayed Information section.

e Click Finish to save your changes.

The next time a user who has the Field Sales Rep role edits a contact record, or creates a new contact record, the user can set up the Twitter RSS feed for a contact as described in the following procedure.

To set up the Twitter RSS feed for a contact (User)

1 Open an existing contact record, or create and save a new contact.

2 In the Contact Detail page, if the Contact Twitter Feed applet is not displayed on the page, add the applet as follows:

a Click Edit Layout.

b If the Personal Layout page opens, then click Related Information.

c In the Personal Layout - Related Information page, use the arrows to move the Contact Twitter Feed applet from the Available section to the Displayed Information section.

d Save your changes.

3 In the Contact Detail page, click Edit.

4 In the Contact Edit page, in the Twitter ID field, enter the Twitter ID for the contact.

5 Save your changes.

The Twitter feed for the contact appears in the Contact Twitter Feed applet on the Contact Detail page.

Translating Web Applet and Custom Report Names

Depending on the setting of the Enable Language Translation Support for Web Applets check box on the company profile, you might be able to enter translated names for the following types of applets:

- Custom Web applets, including global Web applets and Web applets for record types
- Applets that display custom reports on record-type homepages

- Applets that display custom reports on My Homepage

If the Enable Language Translation Support for Web Applets check box is deselected on the company profile, then you cannot enter translated names for these types of applets.

If the Enable Language Translation Support for Web Applets check box is selected on the company profile, then the behavior is as follows for these types of applets:

- The Translation Language field is available when you view a list of the applets. You can create applets only if the language that is selected in the Translation Language field is the default language for the company. After you create a new applet, the applet name appears in blue font and within brackets in every language other than the default language for the company. You can then edit the applet to enter the translated versions of the applet name.
- The Mark for Translation check box is available in the pages where you edit the applets. If you change the name of the applet in the default language for the company, then you can use the Mark for Translation check box to indicate whether the translated versions of the applet name are to be replaced by the updated name, or whether they are to remain unchanged. If you select the Mark for Translation check box, then the updated applet name appears in the default font in the default company language, and it also appears in blue font and within brackets in every other language until you enter the translated name for the language. If you do not select the Mark for Translation check box when you update the applet name in the default company language, then the applet name changes in the default company language, but the translated applet names are not changed.

NOTE: When you first create an applet, the Mark for Translation check box is selected and read-only. The Mark for Translation check box is effective only when you update an existing applet. In addition, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Language field in the list of applets before you edit the applet.

The following procedure describes how to enter a translated version of an applet name.

To enter a translated version of an applet name

1. Navigate to the List page for the applets.
2. In the List page for the applets, in the Translation Language field, select the language for which you want to enter a translated name.
3. Click the Edit link for the applet.
4. In the Name field, enter the translated name for the applet.
5. Save your changes.

Repeat this procedure for each language as necessary.

Related Topics

- Creating Web Applets for Record Types (on page 1279)
- Creating Homepage Custom Reports (on page 1302)
- Creating Global Web Applets (on page 1333)
- Enabling Custom Reports in My Homepage (on page 1340)

Defining Cascading Picklists

Cascading picklists restrict the values of one picklist, the *related* picklist, based on the value selected in another picklist, the *parent* picklist. For example, a parent picklist might present a list of service request Categories and drive the value of a related picklist called Sub-Categories. When the user selects, for example, the value Installation for Category, the Sub-Categories picklist is dynamically constrained to show only the picklist values that are associated with the Installation Category.

You can link together multiple picklists, including both pre-defined and custom picklist fields, as cascading picklists. You can also nest cascading picklists, so a related picklist in one cascading picklists definition can be a parent picklist in another cascading picklists definition.

If you have a number of nested cascading picklists, and if you update the top-level parent picklist value, then your updated values are reflected only in the first level of nesting, as shown in the following example:

- You have a cascading parent picklist called Account Type and a related picklist called Account Priority.
- You have a second cascading parent picklist called Account Priority and a related picklist called Account Category.
- You have an Account record with the following values:
  - **Account Type.** The value for this field is Customer.
  - **Account Priority.** The value for this field is High.
  - **Account Category.** The value for this field is Platinum.
- If you update the Account Type value to Partner, then the value for Account Priority is automatically reset. However, the Account Category value remains unchanged.

You can use picklist fields that contain values that are mapped to picklist value groups in cascading picklists. However, in a cascading picklist definition, you can specify only one set of relationships between the values in the parent picklist field and the values in the related picklist fields, regardless of whether you select a picklist value group in the Picklist Value Group list when you define the cascading picklist. For more information about how cascading picklists work with picklist value groups, see About Cascading Picklists and Picklist Value Groups (on page 1295). For more information about picklist value groups, see About Picklist Value Groups (on page 1329).

NOTE: You can also set up cascading picklists that share the configuration of cascading picklists on a different record type. For more information, see Setting Up Shared Cascading Picklists (on page 1294).

Before you begin. Before you create a cascading picklists definition, the parent and related picklists must exist and be visible in your page layout. The parent picklist must be visible in order to filter the related picklist values. For information about creating picklists, see Creating and Editing Fields (on page 1219). To perform this procedure, your role must include the Customize Application privilege.

To create a cascading picklists definition

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Cascading Picklists section, click the required Cascading Picklists link.

   The record types listed include the parent record type and related record types that have custom picklist values. For example, for opportunities there are links for Opportunity Partner, and Opportunity Competitor.
5. In the Cascading Picklists page, do one of the following:
   - Click Edit or Copy to modify an existing cascading picklists definition.
   - Click the New button to create a new cascading picklists definition.

   The Cascading Picklists Wizard guides you through the process.
6. In Step 1 Select Picklists, select a parent picklist and a related picklist.
7. In Step 2 Select Values, you can:
   - View the existing associations between a Parent Picklist value and the Related Picklist values. When you select a value in the Parent Picklist Available Values list, the available values for the related picklist are shown in the Related Picklist Available Values list, and the values that will be displayed are shown in the Related Picklist Displayed Values list. If there are no values in the Related Picklist Displayed Values list, all of the values in the related picklist will be displayed when the corresponding value in the parent picklist is selected.

NOTE: If picklist value groups are defined for your company, then to help you to verify that your configuration of the cascading picklist correctly meets your business needs, you can select or highlight the picklist value group in the Picklist Value Group list. When you select a picklist value group, the Parent Picklist Available Values list and the Related Picklist Available Values list show only the values that are mapped to the picklist value group that you selected.

- Create a new association. Move the desired value from Related Picklist Available Values to Related Picklist Displayed Values.
- Remove an existing association. Move the value from Related Picklist Displayed Values to Related Picklist Available Values.

8 If the Enable Shared Cascading Picklist check box is available, then you can optionally set up the cascading picklists to share the configuration of existing cascading picklists on a different record type. For more information, see Setting Up Shared Cascading Picklists Definitions. The Enable Shared Cascading Picklist check box is available 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 picklists definition on another record type.

   If you select the Enable Shared Cascading Picklist check box, then Step 2 of the Cascading Picklists Setup page shows the associations that are already set up in the cascading picklists on the source record type, and you cannot change the associations.

   NOTE: If you deselect the Enable Shared Cascading Picklist check box on an existing cascading picklist, then the associations become editable, and the cascading picklists no longer share the configuration of the cascading picklists on the other record type.

9 In Step 3 Confirm, you can confirm your selections of Related Picklist values for each Parent Picklist value, and then click Finish to complete defining the cascading relationship between the Parent and the Related picklists.

   Clicking Finish in the wizard returns you to the Cascading Picklist List for the current record type.

   After you click Finish, and add the cascading picklists definition to a page layout, it is automatically activated for all roles that include that layout.

Setting Up Shared Cascading Picklists

On the record types that support sharing picklist values, you can set up cascading picklists that share the configuration of existing cascading picklists on a different record type. The record type where the original cascading picklists are defined is referred to as the source record type, and the record type that shares the configuration of the original cascading picklists is referred to as the destination record type.

For example, you might want to set up cascading picklists on the Account record type so that they have the same picklist values and the same associations between the values as cascading picklists that are already set up on the Contact record type. In this example, the Contact record type is the source record type, and the Account record type is the destination record type.

For a list of the record types that support sharing picklist values, see Creating Custom Picklist Fields with Shared Values (on page 1230).

To set up shared cascading picklists, perform the steps in the following procedure.

Before you begin. The cascading picklists on the source record type must already be set up.

To set up shared cascading picklists

1 In the *record type* Fields page for the destination record type, create custom picklist fields that take their values from the picklist fields that are used in the cascading picklists on the source record type.

   For example, if the cascading picklists on the Contact record type use a field named Class as the parent picklist and a field named Subclass as the related picklist, then do the following on the Account record type:

- Create a custom picklist field and configure it to take its values from the Class field on the Contact record type.
- Create a second custom picklist field and configure it to take its values from the Subclass field on the Contact record type.

NOTE: For information about creating picklist fields that take their values from other picklist fields, see Creating Custom Picklist Fields with Shared Values (on page 1230).

2 In the *record type* Application Customization page for the destination record type, click the required Cascading Picklists link, and then do the following:

   a In Step 1 of the Cascading Picklist Setup page, in the Parent Picklist and Related Picklist fields, select the custom picklist fields that you set up in step 1 of this procedure, and optionally enter a description of the cascading picklists.

      Make sure that the relationship between the parent picklist and the related picklist is the same as the relationship between the corresponding fields on the source record type. In the example used earlier, the Class field is used as the parent picklist in the cascading picklists on the Contact record type, and the Subclass field is used as the related picklist. Therefore, in the cascading picklists on the Account record type, the field that takes its values from the Class field on the Contact record type must be the parent picklist and the field that takes its values from the Subclass field on the Contact record type must be the related picklist.

   b In Step 2 of the Cascading Picklist Setup page, select the Enable Shared Cascading Picklist check box.

      After you select this check box, the page shows the associations that are already set up between the parent values and the related values in the cascading picklists on the source record type, and you cannot change the associations.

   c Click Finish to save the cascading picklists definition.

If any of the values in the source fields are later changed, then the same changes are automatically reflected in the destination fields. Similarly, if any of the associations between the parent values and the related values in the cascading picklists on the source record type are changed, then the same changes are automatically reflected in the cascading picklists on the destination record type.

If you later deselect the Enable Shared Cascading Picklist check box on the cascading picklists, then the associations between the parent values and the related values become editable, and the cascading picklists no longer share the configuration of the cascading picklists on the source record type. Therefore, if any of the associations are later changed in the cascading picklists on the source record type, then the changes are not reflected in these cascading picklists. However, the custom picklist fields on the destination record type continue to take their values from the picklist fields on the source record type, unless you change the configuration of the fields so that they no longer take their values from the picklist fields on the source record type.

About Cascading Picklists and Picklist Value Groups

You can use picklist fields that contain values that are mapped to picklist value groups in cascading picklists. However, in a cascading picklist definition, you can specify only one set of relationships between the values in the parent picklist field and the values in the related picklist fields, regardless of whether you select a picklist value group in the Picklist Value Group list when you define the cascading picklist. If a field is a related field in a cascading picklist definition, and if it is also mapped to picklist value groups, then the values that are available for selection in the field when a record is created or updated are filtered first by the picklist value group on the record and then by the cascading picklist definition.

As an example, assume that you set up the following configuration for the Account record type:

- The Account Type field and the Priority field are linked in a cascading picklist definition, with the Account Type field as the parent picklist field.
- The Picklist Value Group field, the Account Type field, and the Priority field are all present on the Detail page layout.

When the Picklist Value Group field is populated on an account, the values that are available for selection in the picklist fields are as follows:

- In the Account Type field, the values that are mapped to the picklist value group are available for selection.
- In the Priority picklist field, all of the values that are mapped to the picklist value group are available until a value is selected in the Account Type field. After a value is selected in the Account Type field, the values in the Priority field are limited to those values that meet both of the following criteria:
  - The value is mapped to the picklist value group.
  - The value is linked to the value in the Account Type field in the cascading picklist definition.

Related Topics

See the following topics for related information:

- Defining Cascading Picklists (on page 1292)
- About Picklist Value Groups (on page 1329)
- Considerations When Setting Up Picklist Value Groups (on page 1330)
- Process of Setting Up Picklist Value Groups (on page 1330)
- Creating Picklist Value Groups (on page 1331)
- Mapping Picklist Values to Picklist Value Groups (on page 1257)

Managing Search Layouts

For most record types you can specify the fields, both standard and custom fields, which users can use when searching for records. You can optionally specify a default value for each of the targeted search fields. Also, you can specify the fields that are displayed in the search results page. You specify the search fields in a search layout, and you assign a search layout for each record type to user roles as required, see Adding Roles (on page 1396).

You can copy an existing search layout and then modify it to your requirements, or you can edit existing search layouts. The default search layout is read-only. You can copy it, but you cannot delete or edit it. To specify the fields that are used in searches and the fields that are displayed in the search results, you use the Search Layout Wizard.

NOTE: There are limits to the number of characters that you can use in search layout names. For more information, see About Custom Layout Limits (on page 1266).

CAUTION: When you create or edit a search layout for the User record type, do not add both the Reports To field and the Reports To (Alias) field to the same search layout. If both of these fields were made available on a search layout, then searches using that search layout would fail. For more information about the Reports To and the Reports To (Alias) fields, see About the Reports To and Reports To (Alias) Fields on User Records (on page 1377).

Managing the Behavior of Lookup Windows

You can also use the Search Layout Wizard to manage the behavior of Lookup windows and to enable smart-associations. The following options are available for configuring the behavior of the Lookup window for each record type. All of these options are selected in the default search layout:

- **Configure Lookup Window With Default Fields**. If this check box is selected, then a default set of fields is used in single-association and multiassocation Lookup windows for the record type, and in the list of records that opens when a user clicks List Add in a list of related records in a record Detail page. For multiassocation Lookup windows, only the first four of the default fields are used. If you deselect this check box, then the fields that are listed in the Lookup Window Search Results Fields on the search layout are used in the single-association Lookup windows, and the first four of those fields are also displayed in multiassociation Lookup windows and in the list of records that opens when a user clicks List Add in a list of related records in a record

Detail page. For more information about the List Add feature, see Customizing Related Item Layouts (on page 1258).

- **Show Search Results When Lookup Window Opens**. If this check box is selected, then the list of available records is displayed in the Lookup window when it is opened. If the check box is deselected, then no records are displayed when the Lookup window is opened.

  NOTE: If manager visibility is enabled for the company, then the list of records in some Lookup windows can be slow to populate, and in some cases, the Lookup window might time out. To prevent a timeout, deselect the Show Search Results When Lookup Window Opens check box for the record type associated with the Lookup window. The Lookup window then displays no records, and users can specify the search criteria to find the records that they want.

- **Auto-Resolve Enabled**. If this check box is selected, then smart associations are enabled. *Smart associations* in Oracle CRM On Demand are automatic searches that make it easier for users to associate records of different record types, such as account, contact, opportunity, activity, and so on with each other. When smart associations are enabled, users can type all or part of the name of the record that they want to associate with a main record in the appropriate field, and then allow Oracle CRM On Demand to automatically resolve the association. When the user tries to save the changes, Oracle CRM On Demand searches for a match for the name that the user entered. If Oracle CRM On Demand finds a unique match, then the matching record is used, and the user's changes are saved. If Oracle CRM On Demand does not find a match, or if it finds multiple potential matches, then the user is presented with a Lookup window. In the Lookup window, the user can perform additional searches, and then select the appropriate record. If smart associations are not enabled, then users must click the Lookup icon next to a field to open the Lookup window, where they can search for records.
- **Show Context-Sensitive List as Lookup Window Default**. This check box is available only if the Record-Type Lists in Lookup Windows menu is set to Enabled on the company profile. If the Show Context-Sensitive List as Lookup Window Default check box is selected and the record type has one or more context-sensitive lists, then all such lists appear before the other lists in the *record type* List field in the upper-left corner of the Lookup window. Context-sensitive lists are most likely to contain the records that users require. For more information about the *record type* List field and context-sensitive lists, see Searching for Records in Lookup Windows (on page 101). For more information about the Record-Type Lists in Lookup Windows menu, see Setting Up Your Company Profile and Global Defaults (on page 1123).

  NOTE: If you select Disabled in the Record-Type Lists in Lookup Windows menu on the company profile after you set up the search layouts, then the Show Context-Sensitive List as Lookup Window Default check box is no longer available in the Search Layout Wizard. Also, the context-sensitive lists are not available in Lookup windows, and the initial search for a record of a given record type in a Lookup window is performed on all records of that record type that the user can access, regardless of whether the Show Context-Sensitive Lists as Lookup Window Default option was previously selected. However, Oracle CRM On Demand stores the setting for the Show Context-Sensitive List as Lookup Window Default check box for each search layout. If you later select Enabled or Mixed in the Record-Type Lists in Lookup Windows menu on the company profile again, then the setting for the Show Context-Sensitive List as Lookup Window Default check box for each search layout is restored and becomes effective again.

If you are creating a search layout for the Product record type, then the following option is available if you want the search layout window to display products by division:

- **Configure Lookup Window with Division as the Default Search Field.** In Oracle CRM On Demand when you create a search layout for the Product record type in the Search Layout wizard, you can configure the product search layout to list products by divisions by selecting the Configure Lookup Window with Division as the Default Search Field check box. By displaying products by division in the Product Lookup window, this allows users to perform a search within a set of relevant products, and it reduces user error when searching and selecting from a list of products. For more information, see Considerations When Creating Product Search Layouts (on page 1301).

If you are creating a search layout and you want to configure the search result page of enhanced keyword search to display specific result fields for the Account, Opportunity, Contact, Appointment, and Task record types, then the following option is available:

- **Configure Enhanced Keyword Search with Selected Search Results Fields.** If this check box is selected, then the fields defined in the search layout are displayed in the search result page for enhanced keyword search. If this check box is deselected, then the key fields for the record type are displayed in the search result page.

If you are creating a search layout and you want to specify the first field in the list of targeted search fields as the default search field in the Lookup window, then the following option is available:

- **First Targeted Search Field as Default Search in Lookups.** If this check box is selected, then the first field in the list of targeted search fields in the search layout is used as the default search field in the Lookup window. If this check box is deselected, then the default search field is the same as the field on which the lookup is mapped.

Automatically Populated Sort Fields

In the standard application, a sort field is automatically selected when a user creates a new list or performs an advanced search for a single record type. Users can optionally clear the sort field and select up to three sort fields for the new list or the search. If you do not want the default sort field to be automatically selected in the New List and Advanced Search pages for a record type for a given role, then you must deselect the Auto-Populate Sort Field in New List and Advanced Search check box in the search layout that you assign to that role for the record type.

Search Layout Features for Advanced Search of Related Records

When you create or edit a search layout, consider your requirements for making fields available as search fields in advanced searches of related records. When determining if a field is available for searching in an advanced search of related records of a given record type, Oracle CRM On Demand uses the following features from the search layout for the record type in certain circumstances:

- The list of available search fields in the search layout.
- The setting of the Restrict Search to Fields Selected in Related Information Layout check box in the search layout.

For information about when and how Oracle CRM On Demand uses these features to determine whether a field is available for searching in an advanced search of related records, see About Advanced Search of Related Records (on page 95).

Before you begin. To manage search layouts, your role must include the Customize Application privilege.

The following procedure describes how to create or modify a search layout.

To create or modify a search layout

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the record type for which you want to create or modify a search layout.
4. In the *record type* Application Customization page, click the *record type* Search Layout link.
5. In the Search Layout list, do one of the following:
   - Click Edit or Copy to modify an existing layout.
   - Click the New Layout button to create a new layout.
   - Click Remove to delete an existing layout not currently assigned to a role.

   The Search Layout Wizard guides you through the process.
6. In Step 1, Define Layout Name, enter or modify the name and optionally a description for the layout.

7 Click Next.

In Step 2, Specify Search Fields, there are three lists:

- **Not Available Search Fields.** This list displays all the fields that will not be available for search.
- **Targeted Search Fields.** This list displays all the fields that are available for targeted search and will be displayed in the Targeted Search applet for the record type in the Action bar. The Targeted Search applet can display a maximum of ten fields. If you add more than ten fields to the list, and try to save the layout, then an error message is displayed. If you use Targeted Search fields, then the following also happens:
  - The fields are available as the prepopulated default fields in the Advanced Search criteria form.
  - The selected fields appear as the prepopulated default fields in the filter criteria when creating or refining lists.
  - The selected fields appear as the set of fields that you can search in the Lookup window.

  If no fields are specified in this list, then the record type appears in the Targeted Search applet but no search fields are displayed in the applet.
- **Additional Search Fields.** This list displays the fields that are not displayed in the Targeted Search applet but that are available in other searches, such as advanced search. Indexed fields are displayed in green text. Indexed fields that are case-insensitive are displayed in blue text.

NOTE: For optimal performance, use indexed fields when defining your search fields. If either the Targeted Search Fields or Additional Search Fields list contains any fields that are not optimized, then a warning message appears.

You arrange the fields within a list by clicking the up arrow and down arrow, and you move fields between the lists by clicking the right arrow and left arrow, or up arrow and down arrow. The order of the fields in the lists is used in the Targeted Search applet in the Action bar and in the search criteria forms.

NOTE: The fields that are displayed in purple text are always case-insensitive. These fields are not optimized for fast searches.

8 In Step 2, move the fields to the Not Available Search Fields list, and arrange the fields in the Targeted Search Fields and Additional Search Fields lists, as required.

9 (Optional) In Step 2, select or deselect the Restrict Search to Fields Selected in Related Information Layout check box, as necessary, to meet your requirements for making fields available as search fields in advanced searches of related records.

For more information about this check box, see About Advanced Search of Related Records (on page 95).

10 (Optional) If you plan to select the First Targeted Search Field as Default Search in Lookups check box in Step 4 of the Search Layout Wizard, then use the up arrow and down arrow to position the first field in the list of targeted search fields as required.

11 In Step 2, if you do not want the default sort field to be automatically selected in the New List and Advanced Search pages, then deselect the Auto-Populate Sort Field in New List and Advanced Search check box.

12 (Optional) Select the Configure Lookup Window with Division as the Default Search Field check box if you want the search layout window to display products by division.

NOTE: This option is only available when specifying a search layout for the Product record type. For more information, see Considerations When Creating Product Search Layouts (on page 1301).

13 Click Next.

14 (Optional) In Step 3, Specify Default Values for Search Fields, enter or select the default values for the search fields.

You can optionally specify a default value for each of the fields in the list of targeted search fields. If you specify a default value for a search field, then that search field is automatically populated with the default value in the Targeted Search applet in the Action bar, in the Advanced Search criteria form, and when users create a new list. The default values are formatted according to the user's locale, and for picklist fields and multi-select picklist fields, the search field is populated with the corresponding picklist value or values for the user's language.

NOTE: For the Activity record type, you can specify default values for the search fields in the search layouts for appointments and tasks. The search fields are populated with the default values in the Targeted Search applet in the Action bar and in the Advanced Search criteria form when users search for appointments or tasks. However, you cannot create a search layout for the Activity record type, therefore the search fields are never preselected or populated when users create a new list for the Activity record type.

Setting a default value can help users to search more quickly. For example, if you know that users typically search for active accounts, then you can select Active as the default value for the Status search field in the Account record type.

A filter condition is selected by default for each search field, but you can select a different condition. The field type determines which conditions are available for you to select. For example, for a picklist field, the default condition is Equal To, but you might want to change that to a condition such as Contains At Least One Value, and then enter multiple values separated by commas. For fields of the Check Box type, you can select either Is Checked, which is the default condition, or Is Not Checked. If you clear the condition from a search field, then the default condition for the field type is used. For all types of field other than fields of the Check Box type, users can see the condition as tooltip text when they rest their pointer on a search field in the Action bar. Users can change the value in a search field when they perform a search, and can also change the condition when they perform an advanced search, or a search in a List page or Lookup window.

NOTE: When users refine an existing list, the list of search fields and the conditions and values for those search fields are determined by the current list filter.

15 Click Next.

In Step 4, Define Search Results Layout, there are three lists:

- **Not Available Search Results Fields.** This list displays all the fields that will not be displayed in the search results.
- **Lookup Window Search Results Fields.** This list displays the fields that will be displayed in the search results for the Lookup window. This list has a limit of nine fields.
- **Additional Search Results Fields.** This list displays the extra fields, in addition to those in the Lookup Window Search Results Fields list, that will be displayed in the search results other than for Lookup window searches.

  The total number of fields allowed for the Lookup Window Search Results Fields and the Additional Search Results Fields list is 20, which means the search results cannot display more than 20 columns. For more information about searching for records, see Finding Records (on page 74).

  CAUTION: It is recommended that you add fields to the lists sparingly because the number of columns in the lists can affect performance. The performance varies dramatically by record type and by field type. Each additional field can increase the loading time for the list.

16 In Step 4, Define Search Results Layout, move fields to the Lookup Window Search Results Fields and Additional Search Results Fields lists, and rearrange them, as necessary.

NOTE: Unless the Configure Lookup Window With Default Fields check box is selected on the search layout, the Lookup Window Search Results Fields list determines the layout of the search result fields for single-association and multiassociation Lookup windows, and the layout of the list of records that opens when a user clicks List Add in a related information section for the record type in a record Detail page.

17 Select or deselect the following check boxes as required to configure Lookup Windows behavior:

- Configure Lookup Window With Default Fields
- Show Search Results When Lookup Window Opens
- Auto-Resolve Enabled
- Show Context-Sensitive List as Lookup Window Default

- Configure Enhanced Keyword Search with Selected Search Results Fields
- First Targeted Search Field as Default Search in Lookups

18 Click Finish.

Related Topics

See the following topics for related information:

- Customizing Related Item Layouts (on page 1258)
- Customizing Static Page Layouts (on page 1267)
- Creating Record Homepage Layouts (on page 1305)

Considerations When Creating Product Search Layouts

In Oracle CRM On Demand when you create a search layout for the Product record type in the Search Layout wizard, you can configure the product search layout to list products by divisions by selecting the Configure Lookup Window with Division as the Default Search Field check box. By displaying products by division in the Product Lookup window, this allows users to perform a search within a set of relevant products, and it reduces user error when searching and selecting from a list of products.

When you choose to display products by divisions in your product search layout:

- The Product Lookup window uses the Division field as the default search field and is prepopulated with the user's primary division, if the user has one.
- If the Show Search Results when Lookup Window Opens check box is selected, the list of products is displayed and is automatically filtered by the user's primary division. If the user has no primary division, then all products are displayed, but are not filtered.
- If the Show Search Results when Lookup Window Opens check box is not selected, no products are displayed in the Product Lookup window.

When you choose not to display products by divisions in your product search layout:

- The Product Lookup window uses the Product Name field as the default search field.
- If the Show Search Results when Lookup Window Opens check box is selected, the Product Lookup window uses the Product Name field as the default search field and all products are listed.
- If the Show Search Results when Lookup Window Opens check box is not selected, the Product Lookup window uses the Product Name field as the default search field and no products are listed.

The Division field is not automatically added to the Targeted Search applet, however you can add it to targeted search so that it is displayed in the Targeted Search applet in the Action bar.

The user cannot search for Division if it is listed in the Not Available Search Fields list. However, by selecting the Configure Lookup Window with Division as the Default Search Field check box, the user can search for it using a Lookup window only.

NOTE: When you select the Configure Lookup Window with Division as the Default Search Field check box, this setting takes precedence over the First Targeted Search Field as Default Search in Lookups check box. For more information on specifying the default search field in a Lookup window, see Managing Search Layouts (on page 1296).

Related Topics

See the following topics for related information:

- Managing Search Layouts (on page 1296)
- Division Setup (on page 1168)

Managing List Access and List Order

For each record type you can specify the lists that are available for each role, and the order in which the lists are displayed on the record type's Homepage.

You can create a new layout for only those roles that you have not already customized. You can also edit or delete existing layouts. You cannot manage the list access and order for a user's private lists.

Before you begin:

Because you must select a role that this customization applies to, set up all your roles before starting this procedure. To perform this procedure, your role must include the Customize Application privilege and the Manage Public Lists privilege.

To create or modify list access

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click Application Customization.
3. In the Record Type Setup section, click the link for the required record type.
4. In the List Access and Order section, click the *record type* List Access and Order link.
5. In the List Order Layout page, do one of the following:
   - Click Edit or Copy to modify an existing layout.
   - Click the New Layout button to create a new layout.
6. If you are creating a new layout, select a role from the Role Name drop-down list.

   Only roles that do not already have an associated layout are available in the drop-down list.
7. Move lists between the All Lists, Lists Available for this Role, and Show in Short List lists as required.
   - All Lists contains all the lists for the record type, apart from private lists.
   - Lists Available for this Role contains all the lists available for the role that you select. These lists are also displayed in the *record type* List field in Lookup windows for the record type.
   - Show in Short List contains the lists displayed in the List section in the Homepage, in the picklist of lists in the List pages for the record type, and in the *record type* List field in Lookup windows for the record type. For more information about the *record type* List field, see Searching for Records in Lookup Windows (on page 101).
8. Rearrange the order of the lists as required using the up and down directional arrows.
9. Click Save.

NOTE: After you create a list order layout for a role for a given record type, any new public list that is created for that record type will be available to the role by default, but it will not be included in the short list of lists for the role. However, if your user role has the Manage Public Lists privilege and either the Manage Role Lists Order privilege or the Customize Application privilege, then when you create a new public list or refine an existing list and save it as a new public list, you can add the list to the short list of lists for one or more roles that already have a list order layout. You can also choose to make the list unavailable for one or more roles that have a list order layout. For more information, see Creating and Refining Lists (on page 130).

Creating Homepage Custom Reports

You can use the Homepage Custom Report feature to add multiple reports, including both prebuilt and custom reports, to the record-type Homepages. This feature allows you to provide the most relevant information to different users. For example, you can configure the Service Request Homepage for a customer service representative to show a custom service-request report.

For some record types, standard reports are shown on the record-type Homepage by default. You can replace the standard reports with different reports, or you can add additional reports. You can also specify Homepage reports for record types where no report is shown on the record-type Homepage by default.

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 1236).

To make a prebuilt or custom report available on a record-type Homepage, you first create a Homepage custom report record for the report. When you create or edit the Homepage layouts for a record type, any Homepage custom report records that you created for the record type are listed in the All Sections list in the Homepage Layout Wizard. You can then make a report available on a Homepage layout as follows:

- You can move the report to one of the lists of sections that are displayed by default in the Homepage layout, so that any user whose role has that layout automatically sees that report on their record-type Homepage.
- You can move the report to the list of Available sections in the Homepage layout, so that any user whose role has that layout and the Personalize Homepages privilege can add the report to his or her record-type Homepage.

For more information about customizing Homepages, see Creating Record Homepage Layouts (on page 1305). For information about creating custom reports for My Homepage, see Enabling Custom Reports in My Homepage (on page 1340).

About Privileges for Managing Homepage Custom Report Records

If your role has the appropriate privileges, you can create custom report records and add them to custom Homepage layouts for all record types. The following table shows the privileges required for the various tasks involved in making a custom report available on a Homepage.

Task	Privilege Needed	Notes
(Optional) Create a custom report and publish it to a company-wide folder	Manage Custom Reports	For more information, see Getting Started with Analytics (on page 816).
Create a Homepage custom report record	Customize Application Customize Application - Manage Homepage Customization Access Migrated Company Wide Shared Folder	Instructions for this task are provided in this topic. The Access Migrated Company Wide Shared Folder privilege is required only if you want to add a report from the Migrated Company Wide Shared Folder to a Homepage custom report.
Add a custom report section to a Homepage layout	Customize Application Customize Application - Manage Homepage Customization	For more information, see Creating Record Homepage Layouts (on page 1305).
Add a Homepage layout to a user role	Manage Roles and Access	For more information, see Adding Roles (on page 1396).
(Optional) Add or remove a custom report section on a Homepage (end user)	Personalize Homepages	For more information, see Changing Your Homepage Layouts (on page 758).

Before you begin:

- The report that you want to enable in a Homepage must be stored under Shared Folders, in a folder to which you have access.
- If the Enable Language Translation Support for Web Applets check box is selected on the company profile, then you can create custom reports only if the language that is selected in the Translation Language field is the default language for the company.

To create a Homepage custom report

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Homepage Layout Management section, click *record type* Homepage Custom Report.
5. Click New Homepage Report.
6. On the Homepage Custom Report Detail page, complete the following fields.

Field	Comments
Name	Enter the name of the custom report.
Mark for Translation	This check box is available only if the Enable Language Translation Support for Web Applets check box is selected on the company profile. When you create a custom report, the Mark for Translation check box is selected and read-only. Also, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Field in the list of custom reports before you update an existing custom report. If you change the name of an existing custom report in the default language for the company, then use the Mark for Translation check box as follows: - If you want the translated versions of the name to be replaced by the updated name, then select the Mark for Translation check box. - If you want the translated versions of the name to remain unchanged, then do not select the Mark for Translation check box. For more information about translating custom report names, see Translating Web Applet and Custom Report Names (on page 1291).
Height	Select Single or Double. If you set the height to Double, the report becomes twice the height of the other sections on the Homepage.

Field	Comments
Width	Select Single or Double. If you want the report to span the entire Homepage from left to right, set the width to Double. **NOTE:** Reports that have an HTML RowSpan attribute value of more than 2 sometimes span beyond the specified size.
Execute Report Immediately	If you select this check box, the report will run automatically, and users will not have to click a link to update the report.

1. Click the Lookup icon (magnifying glass) for the Report Path field, and then navigate to the report you require in Shared Folders.

   The Report Path field is automatically populated after you select the report.
2. If you want any prompts that are configured for the analysis to be displayed so that users can filter the analysis, then select the Display Report Prompts check box.
3. Specify whether the users who view the embedded analysis can refresh, print, or export the analysis:
   - **Refresh Link.** If this check box is selected, then the Refresh link is available and users can refresh the data in the analysis.
   - **Print Link.** If this check box is selected, then the Print link is available and users can print the analysis.
   - **Export Link.** If this check box is selected, then the Export link is available and users can export the analysis.
4. In the Description field, enter a description for the homepage custom report.
5. Click Save.

Creating Record Homepage Layouts

You can create custom Homepage layouts for all record types. This feature allows you to provide the most relevant information to different users, including the ability to display custom reports on record type Homepages. For example, you can configure the Service Request Homepage for a customer service representative to show the user's current service-request-related task and a custom service-request report.

NOTE: If you want to use a prebuilt or custom report in a custom Homepage layout, you must first create a Homepage custom report record for the report, using the procedure described in Creating Homepage Custom Reports (on page 1302).

You can copy an existing Homepage layout and then modify it to your requirements. You can also edit existing Homepage layouts, with the exception of the default Homepage layout, which is read-only. You can copy the default Homepage layout, but you cannot delete or edit it.

NOTE: The number of characters that you can use in Homepage layout names is limited. For more information, see About Custom Layout Limits (on page 1266).

After you create a custom Homepage layout, you must use the Role Management Wizard to assign the layout to the user roles that need to use that layout. Users whose role includes the Personalize Homepage privilege can customize their own Homepage layout for a record type. The customized layout can display any of the sections that you make available to them in the Homepage layout that is assigned to the users' role for that record type.

Before you begin. To perform this procedure, your role must include the Customize Application privilege and the Customize Application – Manage Homepage Customization privilege.

To create or modify a Homepage layout

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Homepage Layout Management section, click the *record type* Homepage Layout link.
5. In the Homepage Layout list, do one of the following:
   - Click Edit or Copy to modify an existing layout.
   - Click the New Layout button to create a new layout.

   The Homepage Layout Wizard appears to guide you through the process.
6. In Step 1 Layout Name, enter a name for the layout, and a description if required.
7. In Step 2 Homepage Layout, specify the available and displayed sections as follows:
   - Move sections from the All Sections list to the Available Sections list.

     The Available Sections list includes the sections that can be added to a Homepage. If you do not want a user to be able add a section to a Homepage, leave the section in the All Sections list.
   - Move sections from the Left Side list to the Right Side list, and rearrange the information in both lists as required.

     Leave sections that are double width in the Left Side list. They automatically stretch across the Homepage when it is displayed.
8. Click Finish.

NOTE: After you add a custom Homepage layout to the application, you need to make it available to a user role before users can see it. For more information on adding and modifying user roles, see Adding Roles (on page 1396). Users whose role has the Personalize Homepage privilege can edit the layout of their Homepages with any list or report you make available to them in the Homepage layout assigned to their role for that record type.

Customizing the Audit Trail

For many record types, you can use the audit trail to track the creation, deletion, and restoration of records, and also to track updates to specified fields on existing records. An audit trail record shows the details of the user whose action triggered the audit trail record, the type of action that was performed, and a timestamp. When an audited field on an existing record is updated, the audit trail record for the change to the field shows the old and new values for the field.

NOTE: If none of the audited fields is updated when a record is updated, then no audit trail record is generated for the operation.

Company Settings for the Audit Trail

The length of time that the audit trail records are retained in Oracle CRM On Demand is specified in the Audit Expiry (Days) field in the company profile. In the standard application, the records are retained for 90 days, but administrators can specify a different length of time.

The maximum number of fields that you can audit for a record type is specified in the Record Type Auditable Fields field in the company profile. In the standard application, the maximum is 35 fields, but administrators can change this limit.

NOTE: The maximum number of fields that can be audited for a record type is shown in the Audit Field Setup page for each record type, but the value cannot be changed in that page.

For information about changing the company settings for the audit trail, see Configuring Company Settings (on page 1124).

Auditing Takes More Time and Resources

Auditing adds processing time to an operation, because the auditing rules must be evaluated when the operation is performed. For update operations, an audit trail record must be generated and stored for each audited field that is updated, so the more fields that you audit on a record type, the longer it takes to save a record of that type.

Audit Trail Configuration

For each of the record types that support the audit trail, you can specify the following:

- Which fields you want to audit.
- Whether you want to track the creation of records.

  NOTE: You cannot deselect the option to track the creation of records in the User audit trail.

- For records that can be deleted, whether you want to track the deletion and restoration of those records.

  NOTE: The option to track the deletion and restoration of records is not available for the User and User Partner Admin audit trails, because such records cannot be deleted.

The audit trail for a record type is enabled as soon as you specify that at least one field is to be audited for the record type, or you select one of the options to track the creation, deletion, and restoration of records.

About Making Audit Trail Records Visible to Users

The audit trail records appear in the Audit Trail related information section in record Detail pages, as described in Viewing Audit Trails for Records (on page 175). To make the audit trail records visible to users, you must do the following:

- Add the Audit Trail related information section to the relevant layouts for the record Detail page for a record type.

  NOTE: The Audit Trail related information section is not available to add to page layouts for the Asset and Revenue record types. Audit trail information for these record types can be viewed in the Master Audit Trail only.

- Update the relevant user access profiles to allow access to the audit trail records. For example, to allow a user to view the audit trail records on accounts, give the user read-only access to the Audit Trail related information type for the Account record type. For more information about access profiles, see Process of Setting Up Access Profiles (on page 1416).

Administrators can also view the full set of audit trail records for all audited record types in the Master Audit Trail, as described in Reviewing Audit Trail Changes with the Master Audit Trail (on page 1176).

Record Types Audited by Default

The audit trail is enabled by default for the Opportunity and Service Request record types when a company is first set up. In addition, for certain record types that are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition, the audit trail is enabled when the record type is enabled for the company. For all of these record types, the audit trail is set up as follows:

- Certain fields are audited. You can add fields to the list of audited fields, and remove fields from the list.
- The option to track the creation of records and the option to track the deletion and restoration of records are selected. You can change these settings.

For the Opportunity and Service Request record types only, the following items are set up by default:

- The Audit Trail related information section is available in the standard Detail page layout.
- All of the standard access profiles provide read-only access to the audit trail records.

The audit trail is also enabled by default for the User record type when a company is first set up. Certain mandatory fields are audited by default. The option to track the creation of records is also selected, and you cannot change this setting.

The following table lists the record types that support the audit trail, and shows whether the audit trail is enabled for the record type by default. It also lists the fields that are audited by default.

NOTE: If you remove all fields from the list of audited fields for a record type, and if you also deselect the options to track the creation, deletion, and restoration of records, then the audit trail is disabled for the record type.

Record Type	Audit Trail Enabled by Default?	Default Audited Fields
Account	No	No fields are audited by default.
Account Event	No	No fields are audited by default.
Accreditation	No	No fields are audited by default.
Activity	No	No fields are audited by default.
Address	No	No fields are audited by default.
Allocation	No	No fields are audited by default.
Application	Yes	Annual Revenue, Application ID, Approval Status, Approved Date, Campaign, Current Approver, Email Address, Existing Partnerships, Expected Partnership Benefits, First Name, Last Name, Location, Main Fax (#), Main Phone (#), Name, Number of Employees, Partner, Partner Program, Partner Type, Program Level, Reject Reason, Source, Submission Status, Work Fax (#), Work Phone (#).
Asset	No	No fields are audited by default.
Blocked Product	No	No fields are audited by default.
Broker Profile	No	No fields are audited by default.
Business Plan	No	No fields are audited by default.
Campaign	No	No fields are audited by default.
Certification	No	No fields are audited by default.
Claim	No	No fields are audited by default.
Contact	No	No fields are audited by default.
Contact State License	No	No fields are audited by default.
Course	No	No fields are audited by default.

Record Type	Audit Trail Enabled by Default?	Default Audited Fields
Coverage	No	No fields are audited by default.
Custom Objects 01 or higher	No	No fields are audited by default.
Damage	No	No fields are audited by default.
Deal Registration	Yes	Approval Status, Associated Contact, Associated Customer, Associated Lead, Associated Opportunity, Cell Phone, City, Close Date, Company Name, Country, Currency, Current Approver, Deal Size, Email, Expiration Date, Fax, First Name, Last Name, Name, Originating Partner Account, Partner Program, Postal Code, Principal Partner, Product Interest, Reject Reason, State, Street, Submission Status, Telephone (#), Type.
Dealer	No	No fields are audited by default.
Event	No	No fields are audited by default.
Exam	No	No fields are audited by default.
Financial Account	No	No fields are audited by default.
Financial Account Holder	No	No fields are audited by default.
Financial Account Holding	No	No fields are audited by default.
Financial Plan	No	No fields are audited by default.
Financial Product	No	No fields are audited by default.
Financial Transaction	No	No fields are audited by default.
Fund	Yes	Owner, Partner, Status, Target Amount.
Fund Request	Yes	Approved, Claim Decision Date, Claim Req., Due Date, Fund, Granted, Owner, Pre-Approval Date, Pre-Approval Req., Status.
HCP Contact Allocation	No	No fields are audited by default.

Record Type	Audit Trail Enabled by Default?	Default Audited Fields
Household	No	No fields are audited by default.
Insurance Property	No	No fields are audited by default.
Inventory Audit Report	No	No fields are audited by default.
Inventory Period	No	No fields are audited by default.
Invitee	No	No fields are audited by default.
Involved Party	No	No fields are audited by default.
Lead	No	No fields are audited by default.
Lead Event	No	No fields are audited by default.
MDF Request	Yes	Amount PreApproved, Amount Requested, Approval Status, Claim Decision Date, Claim Status, Fund, Pre-Approval Date, Submission Status, Submitted Date, Total Claim Amount Approved, Total Claim Amount Requested.
Messaging Plan	No	No fields are audited by default.
Messaging Plan Item	No	No fields are audited by default.
Messaging Plan Item Relations	No	No fields are audited by default.
Objective	No	No fields are audited by default.
Opportunity	Yes	Close Date, Forecast, Owner, Probability (%), Revenue, Sales Stage.
Opportunity Event	No	No fields are audited by default.

Record Type	Audit Trail Enabled by Default?	Default Audited Fields
Order	No	No fields are audited by default.
Partner	No	No fields are audited by default.
Partner Program	No	No fields are audited by default.
Plan Account	No	No fields are audited by default.
Plan Contact	No	No fields are audited by default.
Plan Opportunity	No	No fields are audited by default.
Policy	Yes	Face Amount. For more information, see Policy Fields (on page 707).
Policy Holder	No	No fields are audited by default.
Portfolio	No	No fields are audited by default.
Product Indication	No	No fields are audited by default.
Quote	No	No fields are audited by default.
Revenue	No	No fields are audited by default.
Sample Disclaimer	No	No fields are audited by default.
Sample Lot	No	No fields are audited by default.
Sample Request	No	No fields are audited by default.
Sample Request Item	No	No fields are audited by default.

Record Type	Audit Trail Enabled by Default?	Default Audited Fields
Sample Transaction	No	No fields are audited by default.
Service Request	Yes	Area, Cause, Description, Owner, Priority, Source, Status, Subject, Type.
Signature	Yes	Contact
Social Media	No	No fields are audited by default.
Social Profile	No	No fields are audited by default.
Solution	No	No fields are audited by default.
Special Pricing Request	Yes	Approval Status, Authorized Date, Claim Decision Date, Claim Status, Submission Status, Submitted Date, Total Amount Authorized, Total Amount Requested, Total Claim Amount Approved, Total Claim Amount Req.
User	Yes	Always Send Critical Alerts, Authentication Type, Email, External Identifier for Single Sign-On, Reports To, Role, Status, User Sign In ID. **NOTE:** When the Reports To field on a user record is updated, the value in the Reports To (Alias) field on the record is also updated automatically. Similarly, when the Reports To (Alias) field is updated, the value in the Reports To field is updated automatically. So, an update to either of these fields triggers the creation of an audit trail record.
User Partner Admin	No	No fields are audited by default. As a best practice audit the following fields: Always Send Critical Alerts, Authentication Type, Email, External Identifier for Single Sign-On, Role, Status, User Sign In ID. **NOTE:** In the Master Audit Trail, the changes that are made to user records through the partner self-administration pages are displayed with the User Partner Admin record type.

Record Type	Audit Trail Enabled by Default?	Default Audited Fields
Vehicle	No	No fields are audited by default.

The following considerations apply to fields regarding auditing:

- For the User audit trail, the mandatory fields are displayed in red text in the list of audited fields. You cannot save the User Audit Trail if you remove any of the mandatory fields from the list of audited fields.
- For foreign key fields, the name (not the ID) is stored and displayed in the audit trail. For example, if the Account field on the Opportunity record type is audited, then the audit trail displays the account name instead of the Row ID.
- No address fields are available for any of the auditable record types.
- Picklist fields show the user's language dependent values (LDVs).
- ID columns that are not displayed on the layouts are not available for auditing.

The following procedure describes how to customize the audit trail for a record type.

Before you begin. To perform this procedure, your role must include all of the following privileges:

- Customize Application
- Administer Field Audit
- Manage Roles and Access

To customize the audit trail for a record type

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.
4. In the Field Audit Setup section, click the *record type* Field Audit Setup link.
5. (Optional) Select Audit *record type* Record Creation if you want to track the creation of records in the audit trail.
6. (Optional) Select Audit *record type* Record Deletion/Restore if you want to track the deletion or restoration of records in the audit trail.
7. In the Audit Field Setup page, move fields from the Available fields list to the Audited Fields list as required.

   An error message is displayed if you exceed the company limit.

   The Available Fields list contains all the standard and custom fields for the record type that are not already audited.
8. Click Save.

   Auditing of a field becomes effective immediately after it is enabled.

NOTE: The Invitee, Account Event, Lead Event, and Opportunity Event record types are child record types of the Event record type. You can customize the audit trail fields and configure the Audit Trail related information sections for these record types through the Application Customization pages for the Event record type. You can add the Audit Trail related information section for the Invitee record type to the Invitee Detail page only. You can add the Audit Trail related information section for the Account Event record type to the Account Event Detail page only. You can add the Audit Trail related information section for the Lead Event record type to the Lead Event Detail page only. You can add the Audit Trail related information section for the Opportunity Event record type to the Opportunity Event Detail page only. Also, to allow users to view the audit trail for invitee records, you must update the relevant access profiles to give users read-only access to the Invitee Audit Trail related item for the Event parent record type. To allow users to view the audit trail for Account Event, Lead Event, and Opportunity

Event records, you must update the relevant access profiles to give users read-only access to the Audit Trail related item for the Account Event, Lead Event, and Opportunity Event record types.

About the Information in Modified Fields on Records

Oracle CRM On Demand uses the following system fields to store information about the most recent change to a record:

- Modified External
- Modified: Date
- Modified By
- Modified: Date External

In certain cases, Oracle CRM On Demand writes information to one or more of these fields to reflect a change to the record that is not caused by an explicit user action. For this reason, it is recommended that you do not rely on the information in these fields to track the changes that users make to records. Instead, use the audit trail feature to track the changes that users make to specific fields on records. For information about customizing the audit trail for record types, see Customizing the Audit Trail (on page 1306). For information about viewing the changes to field setup, roles, and access profiles, see Reviewing the Audit Trail for Administration Configuration Changes (on page 1177).

The following is an example of a system change to the Modified By field on a record. A user deletes an account that is linked to a contact record as the primary account for the contact. When the deleted account record is purged from the database, the link between the deleted account and the contact is removed from the database. After the link is removed from the database, the next time that the contact record is opened by any user, Oracle CRM On Demand selects another linked account as the primary account on the contact and writes the ID of the account to the primary account field. Or, if there are no accounts linked to the contact, then Oracle CRM On Demand updates the record to reflect that. Oracle CRM On Demand then updates the Modified By field with the name of the user who opened the contact record.

In addition, in the case of records that are owned by a group, the information in the system fields on the record might be updated automatically after a user is deleted from the group. If the name of the user who is deleted from the group appears in the Owner field on a shared record that the group owns, then the name in the Owner field on that record is changed to the name of another member of the group after the previous owner is deleted from the group. When such a change is made to the ownership of an opportunity record or a portfolio record, the system fields that store information about the most recent change to the record are updated, and the information shows that the record was updated by the Oracle Administrator user. However, in the case of the other record types that support groups, the system fields are not updated. For all record types that support groups, the change to the Owner field on the shared record is not tracked in the audit trail when the field is changed as a result of the user being deleted from the group, even if the Owner field is set up to be audited for the record type.

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

Specifying Dynamic Page Layouts

Dynamic layouts streamline the application for end users by allowing them to manage only the subset of information that is relevant in a given situation. For example, your company might track several different types of accounts, such as customer-type accounts, prospect-type accounts, or partner-type accounts. With the dynamic page layout feature, you can configure different layouts that show a different set of account fields and related items, based on the type of account. You can then associate the different layouts with one or more user roles.

When the user drills down on a particular account record, the user is shown the appropriate page layout, based on the user's role and the type of account.

When you define dynamic page layouts for a record type, a pre-defined picklist value is used to drive the dynamic rendering of the page layouts. You specify a page layout to be displayed for each value of the picklist. The users can then see different page layouts for different records of the same record type, based on the picklist value that they select in the record.

NOTE: When using dynamic layouts, you cannot use picklist values that are identical to internal picklist IDs as this can result in unpredictable behavior.

You must associate your dynamic page layouts with user roles as required. There is a many-to-many relationship between dynamic page layouts and user roles.

Each picklist value has only one layout associated with it, but a page layout can be associated with multiple picklist values. There is a limit of 200 associations between picklist values and page layouts. You cannot delete a layout that is already associated with a user role.

Caution: It is recommended that all dynamic layouts associated with a driving picklist include the driving picklist. If one of your assigned layouts does not have the driving picklist, and the picklist value associated with that layout is selected and saved for a record, you will not see the driving picklist on the layout, and so you cannot edit the field.

The following table shows the predefined driving picklist values for each record type.

Record Type	Driving Picklist
Account	Account Type
Activity: Appointment	Type
Activity: Task	Type
Appointment	Type
Asset	Asset Type
Business Plan	Type
Call Activity	Type
Campaign	Campaign Type
Contact	Contact Type
Custom Objects 01-03	Type
Custom Objects 04 or higher	Type
Deal Registration	Type
Dealer	Status
Event	Type

Record Type	Driving Picklist
Fund	Status
Fund Request	Status
Household	Segment
Inventory Audit Report	Type
Lead	Lead Source
Med Ed	Type
Message Plan Response	Type
Messaging Plan	Type
Messaging Plan Item	Type
Messaging Plan Item Relation	Type
Objectives	Type
Opportunity	Opportunity Type
Opportunity Product Revenue	Type
Partner	Partner Organization Status
Partner Program	Partner Type
Policy	Line of Business
Portfolio	Account Type
Revenue	Type
Revenue: Account Revenue	Type
Revenue: Contact Revenue	Type
Sample Transaction	Type
Service Request	Type
Solution	Status

Record Type	Driving Picklist
Task	Type
Vehicle	Product Type
Vehicle Finance Info	Finance Type

The number of characters that you can use in page layout names is limited. For more information, see About Custom Layout Limits (on page 1266).

Page Layouts and Lists

You can use page layouts and role privileges to limit the fields that users can search, view in lists, and export. When a user creates or refines a list of records or uses advanced search to find records, the privileges and page layouts assigned to the user's role determine which fields the user can search and view.

If the All Fields in Search and Lists privilege is enabled for the user's role, then the user can search all of the search fields that are made available in the search layout that is assigned to the user's role for the record type. Also, when creating or refining a list, the user can select any field to display it as a column in the list of records that is returned by the search.

NOTE: It is recommended that company administrators do not enable the All Fields in Search and Lists privilege for most user roles. When the privilege is not enabled, fields that your company does not use are not visible in search and list pages. This reduces clutter and makes it easier for users to see the fields that they are most interested in.

If the All Fields in Search and Lists privilege is not enabled for the user's role, then the user can search a field only if it meets both of the following criteria:

- The field is an available search field in the search layout that is assigned to the user's role for the record type.
- The field is displayed on the Detail page layout that is assigned to the user's role for that record type. If dynamic page layouts are defined for the role, then the field must be displayed on at least one of the dynamic page layouts.

Also, when creating or refining a list, the user can select a field to display it as a column in the list of records that is returned by the search only if the field is displayed on at least one of the Detail page layouts, including dynamic page layouts, that are assigned to the user's role for the record type. This restriction also affects what the user can export in a list. If the List - Export Displayed Fields privilege is enabled on the user's role, but the List - Export All Fields privilege is not enabled, then the user can export only the fields that are displayed in the list. The user cannot export all fields on the records in the list.

NOTE: In the case of advanced searches that users start from the Advanced link in a list of related records on a parent record, additional considerations apply to the availability of search fields and the fields that can be displayed in the search results. For more information, see About Advanced Search of Related Records (on page 95).

Before you begin. To perform this procedure, your role must include the Customize Application privilege and the Customize Application - Manage Dynamic Layouts privilege.

To create or modify a dynamic page layout

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.

4 In the Dynamic Layout Management section, click the *record type* Dynamic Layout link.
5 In the Dynamic Page Layout list, do one of the following:
   - Click Edit or Copy to modify an existing layout.
   - Click the New Layout button to create a new layout.

   The Dynamic Layout Wizard guides you through the process.
6 In Step 1 Layout Name:
   a Enter a name for the Dynamic Layout.
   b Select a Default Layout. This layout is presented as the default layout in the next step.

   The Driving Picklist field shows the picklist whose values determine which layout is seen by the users.
7 In Step 2 Assign Layouts, associate each of the picklist values with a layout name.

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

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

Related Topics

For information about how personalized page layouts interact with dynamic page layouts:

- How Personalized Related Information Layouts Interact with Page Layouts for Roles (on page 1318)
- How Personalized Field Layouts Interact with Page Layouts for Roles (on page 1322)

How Personalized Related Information Layouts Interact with Page Layouts for Roles

Each user role has an assigned page layout for each record type. Page layouts determine the fields, page sections, and related information sections that users can see on the pages where they create, view, and edit records of the various record types. Users can personalize the layout of the related information sections on the Detail page for a record type if the Personalize Detail Page - Related Information privilege is enabled for their user role. Users can show or hide the related information sections and can also change the order in which the related information sections appear on the Detail page.

NOTE: Depending on the setup of their user role, users might also be able to personalize the field layout on record pages. For more information, see How Personalized Field Layouts Interact with Page Layouts for Roles (on page 1322).

If necessary, you can reset any personalized versions of the page layouts to the default settings for a role. For more information, see Resetting Personalized Page Layouts (on page 1420).

How Personalized Related Information Layouts Interact with Static Page Layouts

When a static page layout is used, a user sees the same layout for all records of a given record type. When a user creates a personalized layout of the related information sections for a static Detail page layout, the behavior is as follows:

- After the user changes the layout of the related information sections on the Detail page for a record type, the user's personalized layout is used each time that the user opens the Detail page for a record of that type.
- The user's personalized layout of the related information sections continues to be used for all records of that record type until one of the following actions occurs:
   - The user edits the personalized layout of related information sections again.
   - The user resets the layout to the default page layout for the user's role.

     NOTE: Restoring a field layout to the default layout does not affect any personalized layouts of related information sections. Similarly, restoring a personalized layout of related information sections to the default layout does not affect any personalized field layouts for the record type.

- The company administrator resets the page layout for the user's role to the default page layout.

  NOTE: If an administrator resets the page layout for a record type to the default layout for a role, then all of the personalized field layouts and all of the personalized layouts of the related information sections for that record type are restored to the default for users who have that role. However, if an administrator assigns a new page layout for a record type to a role, then all users who have that role see the new field layout for the record type, but the users continue to see their personalized layouts of the related information sections for the record type until they restore their related information layouts to the default layout.

- If the company administrator makes changes to the lists of available and displayed related information sections in a default page layout for a user role, then the behavior is as follows:
  - If the company administrator moves a related information section that was previously unavailable to the list of displayed sections or the list of available sections in the default page layout, then the section is not automatically displayed in the user's corresponding personalized layout. If the user wants the newly available section to be displayed, then the user must edit the personalized layout to add the section to the list of displayed sections.
  - If the company administrator moves a related information section from the list of displayed sections to the list of available sections in the default page layout, and if that section is already displayed in a user's personalized layout, then the section continues to be displayed to the user until the user removes the section from the list of displayed sections in the personalized layout or resets the layout to the default layout.
  - If the company administrator moves a related information section to the list of unavailable sections in the default page layout, and if that section is already displayed in a user's personalized layout, then the section continues to be displayed in the record Detail page for that user. However, the next time the user edits the personalized layout for the Detail page, the section no longer appears in the list of displayed sections for the layout, and after the user clicks Save in the Personal Layout page, the unavailable section is removed from the layout and is no longer displayed in the record Detail page.

How Personalized Related Information Layouts Interact with Dynamic Page Layouts

For some record types, company administrators can create dynamic page layouts. In dynamic page layouts, a picklist value in a field on a record is used to determine the dynamic rendering of the page layout for the record. For example, your company might want users to see a certain layout for the Detail pages for accounts where the account type is Customer, and might want users to see a different page layout for accounts where the account type is Competitor. In that case, your company administrator can set up a dynamic page layout for the Account Detail page and assign it to user roles as necessary.

When dynamic layouts are used, the Enable Personalization of Individual Dynamic Page Layouts check box on the company profile determines whether a user can create only one personalized layout of the related information sections for a record type, or can create multiple personalized layouts for a record type. The behavior of the Enable Personalization of Individual Dynamic Page Layouts check box is as follows:

- If the Enable Personalization of Individual Dynamic Page Layouts check box is deselected on the company profile, then a user can create only one personalized layout of the related information sections for a record type. The user's personalized layout of the related information sections is used for the Detail page for all records of that record type regardless of the value in the picklist field that determines the dynamic rendering of the page layout.

  For example, assume that a dynamic layout is used for the Account record type as described earlier. If a user changes the layout of the related information sections while working in the Detail page of an account that has the Competitor account type, then the personalized layout of the related information sections is used in the Detail page for all account records, regardless of the account type.

  After the layout is personalized, any further changes that the user makes to the personalized layout are reflected in the Detail page for all records of that type. If the user resets the layout of the related information sections for the record type to the default layout for the user's role, then the dynamic page layouts for the record type are used for the Detail record pages.

For example, assume that a dynamic layout is used for the Account record type as described earlier. After a user resets the layout of the related information sections for the Account record type to the default layout for the user's role, the appropriate dynamic page layout for the account type, Competitor or Customer, is used.

- If the Enable Personalization of Individual Dynamic Page Layouts check box is selected on the company profile, then a user can choose to create a personalized layout of the related information sections for each of the values in the picklist field that determines the dynamic rendering of the page layout. The user's personalized layout for a picklist value is used each time that the user opens a record of that type in which that picklist value is selected.

  After the user creates a personal layout of the related information sections for a picklist value, the user can change the personalized layout again or can create personalized layouts for other values in the picklist. The user can also choose to reset the layouts of the related information sections for all picklist values to the default page layouts.

Regardless of the setting in the Enable Personalization of Individual Dynamic Page Layouts check box on the company profile, the interaction between a user's personalized layouts of the related information sections and the page layouts for the user's role is as follows:

- If the company administrator makes changes to the lists of available and displayed related information sections in a default page layout for a user role, then the behavior is as follows:
  - If the company administrator moves a related information section that was previously unavailable to the list of displayed sections or the list of available sections in the default page layout, then the section is not automatically displayed in the user's corresponding personalized layout. If the user wants the newly available section to be displayed, then the user must edit the personalized layout to add the section to the list of displayed sections.
  - If the company administrator moves a related information section from the list of displayed sections to the list of available sections in the default page layout, and if that section is already displayed in a user's personalized layout, then the section continues to be displayed to the user until the user removes the section from the list of displayed sections in the personalized layout or resets the layout to the default layout.
  - If the company administrator moves a related information section to the list of unavailable sections in the default page layout, and if that section is already displayed in a user's personalized layout, then the section continues to be displayed in the record Detail page for that user. However, the next time the user edits the personalized layout for the Detail page, the section no longer appears in the list of displayed sections for the layout, and after the user clicks Save in the Personal Layout page, the unavailable section is removed from the layout and is no longer displayed in the record Detail page.

About Changing the Enable Personalization of Individual Dynamic Page Layouts Option

Company administrators can change the setting of the Enable Personalization of Individual Dynamic Page Layouts check box on the company profile. If you change the setting of the check box, then the layouts of the related information sections that users see might be affected. The behavior that a user sees when the setting is changed depends on the following:

- Whether the check box was previously selected, thus allowing the user to create personalized layouts of related information sections for individual picklist values for a record type.
- Whether the user previously created either a single personalized layout or multiple personalized layouts of related information sections for pages where dynamic layouts are used.

The following table shows the behavior that a user sees when the Enable Personalization of Individual Dynamic Page Layouts check box is currently deselected, and you select it.

User Previously Created a Single Personalized Layout for a Record Type?	User Previously Created Personalized Layouts for Individual Picklist Values for a Record Type?	Behavior After the Check Box Is Selected
Yes	No	The user sees the set of default dynamic page layouts assigned to the role for the record type.
Yes	Yes	The user sees the personalized layouts that the user previously created for the individual picklist values.
No	No	The user sees the set of default dynamic page layouts assigned to the role for the record type.
No	Yes	The user sees the personalized layouts that the user previously created for the individual picklist values.

The following table shows the behavior that a user sees when the Enable Personalization of Individual Dynamic Page Layouts check box is currently selected, and you deselect it.

User Previously Created a Single Personalized Layout for a Record Type?	User Previously Created Personalized Layouts for Individual Picklist Values for a Record Type?	Behavior After the Check Box Is Deselected
Yes	No	The user sees the single personalized layout that the user previously created.
Yes	Yes	The user sees the single personalized layout that the user previously created.
No	No	The user sees the set of default dynamic page layouts assigned to the role for the record type.

User Previously Created a Single Personalized Layout for a Record Type?	User Previously Created Personalized Layouts for Individual Picklist Values for a Record Type?	Behavior After the Check Box Is Deselected
No	Yes	The user sees the set of default dynamic page layouts assigned to the role for the record type.

NOTE: If the personalized layouts that your users created in the past are likely to be different from the current default layouts, then you might want to reset the page layouts for a role to the default layouts after you change the setting of the Enable Personalization of Individual Dynamic Page Layouts check box. However, resetting the page layouts for a role resets any personalized field layouts to the default layout, as well as resetting the layouts of the related information sections. Alternatively, you might recommend that users reset their layouts of the related information sections to the default.

Related Topics

For more information about page layouts, see the following topics:

- Customizing Static Page Layouts (on page 1267)
- Specifying Dynamic Page Layouts (on page 1314)
- Resetting Personalized Page Layouts (on page 1420)
- How Personalized Field Layouts Interact with Page Layouts for Roles (on page 1322)

How Personalized Field Layouts Interact with Page Layouts for Roles

Users can personalize the field layout on the Detail page for a record type when their user role is set up as follows:

- The Personalize Detail Page - Fields privilege is enabled for the role.
- A custom page layout is assigned to the role for the record type.

NOTE: If the standard layout is assigned to a role for a record type, then users cannot personalize the field layout for that record type. Also, you cannot configure a user role so that users can personalize some, but not all, of the custom page layouts that are assigned to their role. If the user role includes the Personalize Detail Page - Fields privilege, then the users who have that role can personalize all of the custom page layouts that are assigned to the role.

When you set up custom page layouts, you can specify that certain fields must always appear on the layout. With the exception of required fields and the fields that you specify must always appear on the layout, users can show or hide the fields on their personalized layout. Users can also change the order in which the fields appear on the Detail page. Users cannot add any fields that do not appear on the default layout to their personalized layout. Users can personalize the field layouts for both static and dynamic layouts.

NOTE: Depending on the setup of their user role, users might also be able to personalize the layout of the related information sections on record Detail pages. For more information, see How Personalized Related Information Layouts Interact with Page Layouts for Roles (on page 1318).

After a user creates a personalized field layout, that layout is used each time that the user opens or edits a record of that record type until one of the following actions occurs:

- The user changes the field layout again.
- The user restores the default field layout for the page.

NOTE: Restoring a field layout to the default layout does not affect any personalized layouts of related information sections. Similarly, restoring a personalized layout of related information sections to the default layout does not affect any personalized field layouts for the record type.

- The administrator resets the page layout for the user's role to the default layout, or assigns a different layout to the role for that record type.

  NOTE: If an administrator resets the page layout for a record type to the default layout for a role, then all of the personalized field layouts and all of the personalized layouts of the related information sections for that record type are restored to the default for users who have that role. However, if an administrator assigns a new page layout for a record type to a role, then all users who have that role see the new field layout for the record type, but the users continue to see their personalized layouts of the related information sections for the record type until they restore their related information layouts to the default layout.

About Field Layouts in New Record Pages

A user's personalized layout is also used in the pages where the user enters information for a new record of that record type, unless a custom layout for the new record page is assigned to the user's role for the record type. If a custom layout for the new record page is assigned to the user's role for use in all cases, then the user's personalized layout is never used for the new record pages. However, if the user's role specifies that the custom layout for the new record page is used only when the user creates a record from the Action bar or global header, then the user's personalized field layout is used when the user creates a record from any other area in Oracle CRM On Demand.

What Happens If a Page Layout Changes After Users Personalize the Field Layout?

After users who have a certain role personalize their field layout for a record type, an administrator might make a change to the default layout for the role. Depending on the change that the administrator makes, the changes to the layout interact with the personalized layouts as follows:

- If the administrator assigns a different Detail page layout to the role for the record type, then all users who have the role see the new field layout for the record type the next time they sign in to Oracle CRM On Demand. However, if the administrator later reassigns the original page layout to the role again, then users again see their personalized versions of that layout.
- If an administrator makes a change to the presence, layout, or characteristics of the fields on the field layout for the Detail page that is assigned to the role, then the change is not automatically applied to the personalized layouts. For example:
  - If an administrator removes a field from the Detail page layout, then the field is not removed from the personalized layouts. Also, if a user opens the Personal Layout - Fields page for that page layout, then the field that the administrator removed continues to be available, either in one of the sections in the layout or in the Available Fields list, as specified by the user.
  - If an administrator adds a field to the Detail page layout, then the new field does not appear on the personalized layouts. Also, if a user opens the Personal Layout - Fields page for that page layout, then the field that the administrator added does not appear in any of the sections in the layout or in the Available Fields list.
  - If an administrator changes the characteristics of a field, then the change is not automatically reflected in the personalized layouts. For example, if an administrator makes a field required that was not previously required in the page layout, then the field does not become a required field for users who have personalized their layout. Similarly, if an administrator selects the Always On Layout check box for a field, then the user is not forced to show the field on their personalized layout, even if the user makes further updates to the personalized layout after the administrator makes the change.

If an administrator wants the changes to the field layout to apply to all users who have the role, then the administrator must reset the page layout to the default layout for the role. Alternatively, users can reset their page layout to the default and then optionally personalize the layout again.

Related Topics

For more information about page layouts, see the following topics:

- Customizing Static Page Layouts (on page 1267)
- Specifying Dynamic Page Layouts (on page 1314)
- Resetting Personalized Page Layouts (on page 1420)
- How Personalized Related Information Layouts Interact with Page Layouts for Roles (on page 1318)

About URL Standardization

In Oracle CRM On Demand, various URLs have been standardized for all record types, so the following URLs when used in Web links, Web tabs, and Web applets will work for future releases of Oracle CRM On Demand:

- Opening a record type homepage
- Opening a record detail page using a record ID
- Opening a record edit page using a record ID
- Creating or editing a record with a prepopulated driving picklist field value to determine the page layout
- Creating or editing a record with prepopulated values for the parent picklist and related picklist of a cascading picklist field
- Updating an opportunity record to update the Sales Stage field to start a sales process

Related Topics

See the following topics for related information:

- Displaying External Web Pages, Reports, and Dashboards in Tabs (on page 1324)
- About Custom Web Applets (on page 1277)
- Creating Web Applets for Record Types (on page 1279)
- Creating Global Web Applets (on page 1333)
- Setting Up Web Links (on page 1233)
- Working with RSS Feed Applets (on page 45)

Displaying External Web Pages, Reports, and Dashboards in Tabs

You can display Web content in a tab within Oracle CRM On Demand. The Web content can be external Web pages or company data available from the Web. For example, you might track inventory information in another Web application, which you want to make available to your service representatives when they are working in Oracle CRM On Demand. To address this requirement, you can create a custom Web tab to display your external Web application within the main content area of Oracle CRM On Demand. You can also embed reports and dashboards from the Analytics catalog in custom Web tabs.

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 1236).

You can also create custom Web applets to contain Web content, reports, and dashboards. For information about custom Web applets and how they compare with custom Web tabs, see About Custom Web Applets (on page 1277).

NOTE: For information about the considerations that apply to using customized code in Oracle CRM On Demand, see Important Considerations for Customers Using Customized Code in Oracle CRM On Demand (on page 1334).

To make a custom Web tab visible, you must add the tab to the required user role using the Role Management Wizard.

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

Before you can display external information on an Oracle CRM On Demand page, you must ensure that:

- The external application has a Web interface
- The external application or Web page does not require full control of the browser window

To embed a report or dashboard in a Web tab, the report or dashboard must be stored under Shared Folders, in a folder to which you have access.

NOTE: You must ensure Web services are enabled for your company if you plan to use features such as Single Sign On, or to integrate your Web site with Oracle CRM On Demand.

To display an external Web page, Report, or Dashboard in a tab

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click Application Customization.
3. In the Application Setup section, click the Custom Web Tabs link.
4. On the Custom Tab List page, click New.
5. On the Custom Web Tab page, use the table below to fill in the required information and save the record.
6. (Optional) To indicate that an updated name must be translated to other languages that are activated for your company, select the Mark for Translation check box (on the Custom Web Tab Lists page) for the Web tab.

Field	Comments
Name	The name of the custom Web tab.
Type	Select the type of Web tab that you want to create: URL, HTML, Report, or Dashboard.

Field	Comments

User and System Fields	Before you create a Web applet in Oracle CRM On Demand, carefully consider how you will use parameter field variables such as %%%User Id%%%, if the field contains characters that can be escaped as character entity references.
	
	When you insert parameter field variables in HTML, characters in the field name like & are escaped as the corresponding character entity reference, (in this case &) and the browser expands the entity reference so that the referenced character is displayed. For example, you might want to create a homepage HTML Web applet with the company name: A&B Manufacturing. From the User and System Fields drop-down list, you can choose Company Name to insert the variable: %%%Company name%%% and at run time, this variable has the value A&B Manufacturing, which appears in the browser as A&B Manufacturing. However, character entity references are not expanded in JavaScript code, so in this case, put the variable in a referenceable context, retrieve it from the document DOM, then encode it as necessary. These differences are illustrated in the following example of Web Applet HTML code:
	
	`<span id="companyname" style="display:none" data-value="%%%Company name%%%"></span>`
	
	`<script type="text/javascript">`
	
	`var var1 = "%%%Company name%%%";`
	
	`var var2 = document.getElementById("companyname").getAttribute("data-value");`
	
	`</script>`
	
	The value of var1 is "A&B Manufacturing" and the value of var2 is "A&B Manufacturing". The values of var1 and var2 are different because the browser expands entity references in HTML tags and data, but not within the <script> element.
	
	Select an option from the User and System Fields drop-down list to add parameter fields to the URL or HTML field at the current position of the cursor. For example, if you choose User id from the drop-down list, %%%User id%%% is inserted into the URL or HTML field, depending on where your cursor is positioned. At run-time, this parameter is replaced with the user ID of the user who is signed in.
	
	As another example, if you choose Host Name from the list, %%%Hostname%%% is inserted at the cursor position. At run-time, this parameter is replaced with the host name of the server where Oracle CRM On Demand is running. This is useful in configurations containing a URL to Oracle CRM On Demand as it is no longer necessary to manually modify the Oracle CRM On Demand host name when migrating from one environment to another.
	
	For more information, see User and System Fields (on page 1242).

Field	Comments
URL	**NOTE:** This setting is available only if you select URL from the Type menu. Enter the URL that is invoked when the user clicks the hyperlink, such as www.oracle.com. You do not have to enter the *http://* part of the URL. Make sure that the URL is a valid uniform resource identifier (URI). If it is not valid, then an error message is displayed instead of the embedded content when a user accesses the custom Web tab. **NOTE:** For more information on the standardization of URLs in Oracle CRM On Demand, see About URL Standardization (on page 1324). You can also include context-sensitive parameters by placing the cursor in the URL field, and then selecting the User and System Fields drop-down list. This action places a field parameter in the URL (designated by %%%fieldname%%%), which is replaced by the field value that is based on the current record when the user clicks the value. If you do not specify any URL, then the user is directed to a void URL when clicking the tab. Each browser has a maximum URL length. If you specify a URL that exceeds this length, users might see indeterminate behavior on the browser when they click the Web tab. **NOTE:** Although it is possible to use a URL to embed a report or dashboard in a custom Web tab of the URL type, this functionality is not fully supported, and the URL might not work after an upgrade.
HTML Head Additions	**NOTE:** This setting is available only if you select HTML from the Type menu. The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web tab. Any code that you add to the Web Tab HTML field is added to the <iframe> element. You can include references to JavaScript files that you embed in the <head> section of the HTML in this field. Referencing JavaScript files in Oracle CRM On Demand pages is not supported. Any content that you enter in this field is added to the <head> tags.
Web Tab HTML	**NOTE:** This setting is available only if you select HTML from the Type menu. The HTML that you enter is used in the src attribute of an <iframe> element within the HTML code of the page to which you add the Web tab. Any code that you add to the Web Tab HTML field is added to the <iframe> element. Any content that you enter in this field is added to the <body> tags.

Field	Comments
Path	**NOTE:** This field is available only if you select Report or Dashboard from the Type menu. Click the Lookup icon (magnifying glass), then navigate to the report or dashboard you require in Shared Folders, and then click OK. The Path field is automatically populated after you select the report or dashboard.
Display Report Prompts	**NOTE:** This check box is available only if you select Report from the Type menu. If you select this check box, then any prompts that are configured for the analysis are displayed in the custom Web applet, and users can filter the analysis.
Parameters	**NOTE:** This field is available only if you select Report or Dashboard from the Type menu. (Optional) If you want to specify filters that will be applied to the report or dashboard at run time, then specify the filters in the Parameter field. For detailed information about specifying the filters, see About Specifying Filters for Embedded Reports and Dashboards (on page 1237).
Description	Enter a description for the Web tab.
Refresh Link	**NOTE:** This check box is available only if you select Report from the Type menu. If this check box is selected, then the Refresh link is available in the custom Web tab and users can refresh the data in the analysis.
Print Link	**NOTE:** This check box is available only if you select Report from the Type menu. If this check box is selected, then the Print link is available in the custom Web tab and users can print the analysis.
Export Link	**NOTE:** This check box is available only if you select Report from the Type menu. If this check box is selected, then the Export link is available in the custom Web tab and users can export the analysis.
Height	Enter a pixel value for the Web tab.
Width	Enter a pixel value for the Web tab.
Classic Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web tab in classic themes.

Field	Comments
Modern Icon	Click the Lookup icon (magnifying glass) to select the icon that is to be used for the Web tab in modern themes.

NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation Language list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. The updated name in blue text helps you to track which terms must be translated.

After you add a custom Web page to Oracle CRM On Demand, you must make it available to the user role before users can see it. For information on adding roles, see Adding Roles (on page 1396).

About Picklist Value Groups

Your company can limit the values that are available in a picklist field to a subset of the values that are defined for the field, so that you can make a given picklist field on a record type available for all users in Oracle CRM On Demand while limiting the values that appear in the picklist in the field. To limit the values in picklist fields, you set up picklist value groups and then map the values in the picklist fields to the picklist value groups. In this way, the set of values that a user can select from a picklist can be controlled by a picklist value group.

You can add the Picklist Value Group field to the page layout for some record types. This field allows the user to select any picklist value group that you have created. Then, in any picklist field that is controlled by the picklist value group that is selected on the record, only the values that are mapped to the picklist value group appear in the picklist. A picklist field that is controlled by a picklist value group is controlled in the same way when the picklist field is used in a cascading picklist. For a list of the record types in which picklist value groups can be used, see Record Types That Support Picklist Value Groups and Divisions (on page 1331).

For example, assume that your company has three call centers that use Oracle CRM On Demand. Depending on the location of a call center and the products that the call center services, some of the values in a number of picklist fields in Oracle CRM On Demand are not valid selections for users in the various call centers. In such a case, you can set up three picklist value groups; that is, one picklist value group for each call center. You can then map a subset of the values for each of the relevant picklist fields to each of the picklist value groups. After you add the Picklist Value Group field to the page layouts for the record types, users can select the appropriate picklist value group for a call center in the Picklist Value Group field on a record. Then, the choices in the picklist fields on the record are limited to the values that you mapped to the selected picklist value group for the call center. Controlling the available values in picklist fields in this way can help you to reduce the risk of invalid data being recorded on the records.

About Picklist Value Groups and Divisions

If your company uses the Division record type, then you can also associate divisions with picklist value groups. For information about divisions and how to set them up, see Division Setup (on page 1168). Each division can be associated with one picklist value group only. If a user is associated with one or more divisions, then when the user creates a record of a record type that supports divisions, the user's primary division is automatically assigned to the record. If the Division field and the Picklist Value Group field are both present on the Detail page layout, and if a picklist value group is associated with the user's primary division, then the Picklist Value Group field on the record is populated with the name of that picklist value group. Then, in any picklist field that is controlled by the picklist value group, only the values that are linked to the picklist value group appear in the picklist. For more information about the behavior of the Division and Picklist Value Group fields when records are created and updated, see About Divisions and Picklist Value Groups on Records (on page 1173) and About Picklist Fields, Picklist Value Groups, and Divisions (on page 58).

For information about setting up picklist value groups, see the following topics:

- Considerations When Setting Up Picklist Value Groups (on page 1330)

- Process of Setting Up Picklist Value Groups (on page 1330)
- Creating Picklist Value Groups (on page 1331)
- Mapping Picklist Values to Picklist Value Groups (on page 1257)

Related Topics

See the following topics for related information:

- Division Setup (on page 1168)
- About Divisions and Picklist Value Groups on Records (on page 1173)

Considerations When Setting Up Picklist Value Groups

When setting up picklist value groups, consider the following:

- **Picklist fields.** A picklist value group can control one or more picklist fields on one or more record types. On the record types that support picklist value groups, you can map any editable picklist field to multiple picklist value groups.
- **Cascading picklists.** You can use picklist fields that contain values that are mapped to picklist value groups in cascading picklists. However, in a cascading picklist definition, you can specify only one set of relationships between the values in the parent picklist field and the values in the related picklist fields, regardless of whether you select a picklist value group in the Picklist Value Group list when you define the cascading picklist. For more information about how cascading picklists work with picklist value groups, see About Cascading Picklists and Picklist Value Groups (on page 1295).
- **Page layouts.** You must add the Picklist Value Group field to the page layouts for the record types on which you want the picklist fields to be controlled by the picklist value groups.
- **Divisions.** You can associate a picklist value group with one or more divisions, but each division can be associated with only one picklist value group. You can see a list of the divisions that are associated with a picklist value group in the read-only Divisions section of the Picklist Value Group Detail page.
- **Search.** You cannot search for picklist value group records in the Action bar or in an advanced search.
- **Picklist Value Group field.** For the record types that support picklist value groups, you can do the following:
  - Specify the Picklist Value Group field as read-only if you do not want users to be able to change or clear the value in the field.
  - Use the Picklist Value Group field in Expression Builder.
  - Use the Picklist Value Group field in workflow rules.
  - Include the Picklist Value Group field in the search layouts.

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

Related Topics

See the following topics for related information:

- Process of Setting Up Picklist Value Groups (on page 1330)
- Creating Picklist Value Groups (on page 1331)
- Mapping Picklist Values to Picklist Value Groups (on page 1257)

Process of Setting Up Picklist Value Groups

Before you begin. Review the information in Considerations When Setting Up Picklist Value Groups (on page 1330).

To set up picklist value groups for your company, perform the following tasks:

1. Determine the following:
   - The picklist value groups that you want to set up.

- The picklist fields that you want your picklist value groups to control.
- For each picklist field that you want your picklist value groups to control, the values that you want to map to each picklist value group.

2 Create your picklist value groups.

For more information, see Creating Picklist Value Groups (on page 1331).

3 Map the values in the picklist fields to your picklist value groups.

For more information, see Mapping Picklist Values to Picklist Value Groups (on page 1257).

4 Add the Picklist Value Group field to each of the page layouts for the record types on which the picklist fields will be controlled by the picklist value groups.

For more information, see Customizing Static Page Layouts (on page 1267) and Specifying Dynamic Page Layouts (on page 1314).

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

Creating Picklist Value Groups

To create a picklist value group, complete the steps in the following procedure. This task is a step in Process of Setting Up Picklist Value Groups (on page 1330).

Before you begin. To perform the procedures described in this topic, you must have the Customize Application privilege in your user role.

To create a picklist value group

1 Click the Admin global link.
2 In the Application Customization section, click Application Customization.
3 In the Application Setup section, click Manage Picklist Value Groups.
4 In the Picklists Value Group List page, click New.
5 Enter a name and a description for the picklist value group, and then save your changes.

NOTE: After you create a picklist value group, you can map picklist field values to the picklist value group. For more information, see Mapping Picklist Values to Picklist Value Groups (on page 1257). You can then see a list of the picklist fields that are mapped to the picklist value group in the Objects List section of the Picklist Value Group Detail page. For each picklist field that is mapped to the picklist value group, the name of the record type on which the picklist field appears and the name of the picklist field are shown.

If your company uses the Division record type, then the Divisions section of the Picklist Value Group Detail page shows the names of the divisions with which the picklist value group is associated. For information about associating picklist value groups with divisions, see Associating Picklist Value Groups with Divisions (on page 1170).

Record Types That Support Picklist Value Groups and Divisions

The Division field and the Picklist Value Group field are available to be added to page layouts for the following record types, so that a division and picklist value group can be associated with a record of any of these record types:

- Account
- Activity
- Blocked Product
- Broker Profile
- Business Plan

- Campaign
- Claim
- Contact
- Custom Objects
- Damage
- Deal Registration
- Deal Registration Product Revenue
- Event
- Financial Account
- Financial Account Holder
- Financial Account Holding
- Financial Plan
- Financial Product
- Financial Transaction
- Fund
- HCP Contact Allocation
- Household
- Insurance Property
- Lead
- MDF Request
- Message Response
- Messaging Plan
- Messaging Plan Item
- Messaging Plan Item Relations
- Objective
- Opportunity
- Order
- Partner
- Plan Account
- Plan Contact
- Plan Opportunity
- Policy
- Policy Holder
- Portfolio
- Product
- Product Indication
- Sample Disclaimer
- Sample Inventory
- Sample Lot
- Sample Request
- Sample Request Item
- Sample Transaction
- Service Request
- Solution
- Vehicle

Creating Global Web Applets

A global Web applet is a custom Web applet that can appear on My Homepage or in the Action bar. You can embed external Web content in custom global Web applets. You can also embed reports and dashboards in custom global Web applets.

When you create a global Web applet, you must add it to the layout for My Homepage or the Action bar.

Before you begin. To perform this procedure, your role must include the Customize Application and Manage Custom Web Applets privileges. If the Enable Language Translation Support for Web Applets check box is selected on the company profile, then you can create applets only if the language that is selected in the Translation Language field is the default language for the company.

To create a new global web applet

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click Application Customization.
3. In the Application Setup section, select Global Web Applets.
4. In the My Applet List, click New.
5. On the My Web Applet page, complete the following fields:

Field	Comments
Name	Enter a name.
Mark for Translation	This check box is available only if the Enable Language Translation Support for Web Applets check box is selected on the company profile. When you first create an applet, the Mark for Translation check box is selected and read-only. The Mark for Translation check box is effective only when you update an existing applet. In addition, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Language field in the list of applets before you edit the applet. If you change the name of an existing custom Web applet in the default language for the company, then use the Mark for Translation check box as follows: - If you want the translated versions of the name to be replaced by the updated name, then select the Mark for Translation check box. - If you want the translated versions of the name to remain unchanged, then do not select the Mark for Translations check box. For more information about translating custom Web applet names, see Translating Web Applet and Custom Report Names (on page 1291).

Field	Comments
Location	Select Homepage or Action bar, depending on whether the external content, report, or dashboard is to appear on a homepage or on the Action bar.
Columns	**NOTE:** This field is applicable only when the Location value is Homepage. Specify the width of the applet by selecting single or double from the Columns menu.
Always Run	This check box determines whether a global Web applet is executed if the applet is minimized. This check box is available only for global Web applets for which you select Action bar as the location. **Note:** Global Web applets that you add to the global header always execute, regardless of whether the Always Run check box is selected or not. The global header is visible only with modern themes.

Next, complete the fields according to the type of applet you require, as described in the following topics:

- Creating Dashboard Web Applets (on page 1289)
- Creating HTML Web Applets (on page 1284)
- Creating Report Web Applets (on page 1287)
- Creating RSS Feed Web Applets (on page 1281)
- Creating URL Web Applets (on page 1285)

Related Topics

- Example of Setting Up an RSS Feed Web Applet (on page 1290)
- Translating Web Applet and Custom Report Names (on page 1291)

Important Considerations for Customers Using Customized Code in Oracle CRM On Demand

The following important considerations apply to the use of customized code in Oracle CRM On Demand:

- Customers using customized code, such as JavaScript code, in Oracle CRM On Demand do so at their own risk. Oracle does *not* provide support or troubleshoot for any problems that arise as a result of the use of customized code in Oracle CRM On Demand, including for any modifications that are made to Oracle CRM On Demand through the customized code.
- Customers using customized code, such as JavaScript code, in Oracle CRM On Demand are *strongly* encouraged to test their code after any upgrade to a new release of Oracle CRM On Demand. It is the customer's responsibility to update their customized code after upgrading to a new release. In addition, new releases of Oracle CRM On Demand may contain updated infrastructure components and it is the customer's responsibility to modify any customized code, as necessary, to adapt to any changes in infrastructure components.
- Customers can invoke Oracle CRM On Demand Web Services API methods through customized code. However, Oracle only provides guidance on the use of Oracle CRM On Demand Web Services APIs, Oracle CRM On Demand Web Services session management, and best practices for using Oracle CRM On Demand

Web Services. For more information regarding Oracle CRM On Demand Web Services, see Oracle Web Services On Demand Guide.

- Customers can invoke Oracle CRM On Demand public JavaScript API methods through code in custom HTML head additions. For more information, see Managing Custom HTML Head Additions (on page 1337) and Oracle CRM On Demand JavaScript API Developer's Guide.

Related Topic

See the following topic for related information:

- About Disabling Customized Code for Users (on page 1278)

Uploading Client Side Extensions

Client side extensions are files that you can upload to and host on Oracle CRM On Demand instead of hosting them on other servers. When you upload a client side extension, Oracle CRM On Demand generates a unique URL that you use to reference the extension. One client side extension can call a second client side extension by using the unique URL of the second client side extension. You can use a URL to deploy a client side extension in custom Web tabs, custom Web applets, global Web applets, and in custom HTML head additions.

You can upload HTML, JPG, GIF, SWF, JavaScript, and CSS files from the Oracle CRM On Demand Client Side Extension List page to create a client side extension. The maximum file size is 20 megabytes (MB). However, smaller file sizes provide better performance when the browser downloads these files from Oracle CRM On Demand.

NOTE: Oracle CRM On Demand Customer Care does not have access to any component of client side extensions. These components include the uploaded files or the content contained within those files, images, or locations from which the client side extensions are referenced, including custom Web tabs, custom Web applets, global Web applets, and custom HTML head additions. Therefore, you are responsible for maintaining and supporting these extensions.

Before you begin. To perform this procedure, your role must include the Upload Client Side Extensions and Manage Custom HTML Head Tag privilege. For more information on adding privileges, see About Privileges in Roles (on page 1394).

To upload a client side extension

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click Application Customization.
3. In the Application Setup section, click Client Side Extensions.

   The Client Side Extensions List page displays previously uploaded client side extensions. You can also delete previously uploaded client side extensions on this page.

   NOTE: If you delete a client side extension that has been set up for a custom Web tab, applet, global Web applet, or custom HTML head addition, then those applets will no longer function correctly because the client side extension has been removed. Oracle CRM On Demand does not indicate if a particular client side extension is in use.

4. Click New.
5. Click the paperclip icon to find the content that you want to upload as a client side extension.

   This field is required.

6. Enter the following details:
   - **MIME Type.** This indicates the Internet media type. This type allows the browser to display media types properly. Enter the full details of the MIME types. Enter, for example, one of the following depending on your file type:

  - text/html
  - image/jpeg
  - image/gif
  - application/x-shockwave-flash
  - text/css

- **File: Size (In Bytes).** The size of the uploaded file. Oracle CRM On Demand populates this field.
- **File: Extensions.** The file extension of the uploaded file. Oracle CRM On Demand populates this field.
- **Name.** The name of the client side extension. This field is required.
- **URL Name.** This value is used to provide a meaningful name for the URL that points to the client side extension. The following characters are accepted in the URL name: A-Z, a-z, 0-9, underscore (_), and period (.). Double periods (..) are not permitted, and a period (.) must not be the last character in the string. Examples of URL names are: Logo_Image and Map376. It is recommended that you keep this field as short as possible. This field changes only when a user edits it. Therefore, if you replace the uploaded file, or if you change the client side extension name, then the URL Name field value is unchanged. As a result, you can update, maintain and deploy multiple versions of the client side extension without having to reconfigure the custom Web tabs, custom Web applets, global Web tabs, or custom HTML head additions. Editing this field changes the Relative URL and Full URL fields. This field is required.
- **Relative URL.** Oracle CRM On Demand completes this field. This value is the relative URL that navigates to the client side extension from within Oracle CRM On Demand. If this field value changes, and the client side extension is deployed, then you must update the custom Web tabs, custom Web applets, global Web tabs, or custom HTML head additions that reference this client side extension to use the newly generated URL. This field value changes only if the URL Name field is updated.
- **Full URL.** Oracle CRM On Demand completes this field. This value is the full URL that points to the URL in the Oracle CRM On Demand application. If this field value changes, and the client side extension is deployed, then you must update custom Web tabs, custom Web applets, global Web tabs, or custom HTML head additions that reference this client side extension to use the newly generated URL. This field value changes only if the URL Name field is updated.

7 Click Save.

NOTE: You can upload a client side extension, but it is not active until you configure it in a custom Web tab, custom Web applet, global Web tab, or custom HTML head addition .

After a client side extension is uploaded, Oracle CRM On Demand generates the Relative URL and Full URL fields. You use these values to associate a custom Web tab, custom Web applet, global Web tab, or custom HTML head addition with the client side extension. You configure these locations in the same way that you configure any extension hosted on your servers.

For information about adding custom HTML head additions, see Managing Custom HTML Head Additions (on page 1337).

To edit an existing client side extension

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click Application Customization.
3. In the Application Setup section, click Client Side Extensions.
4. In the Client Side Extensions List page, find the client side extension that you want to edit.
5. Do one of the following:
   - Click the Name field. This step opens the Client Side detail page where you can edit the client side extension.
   - Click Edit.

6 Click Save.

7 If you have replaced the file for the client side extension, do the following:

   a Log out of Oracle CRM On Demand.

   b Clear your browser cache.

   c Log in again to download the new client side extension so that the client side extension is downloaded to the page deploying the client side extension. If you do not log out of Oracle CRM On Demand and log in again, the new client side extension will be downloaded 30 days after you have performed the first download.

Guidelines for Editing Client Side Extensions

Consider the following guidelines:

- **Keep the number of references to client side extensions on a page to a minimum to reduce the negative impact on performance.**
- **Keep the size of your client side extensions as small as possible.** For example, avoid using large image or SWF files. The smaller the file that you download as part of the client side extension, the faster the page loads compared to larger files.
- **Keep all client side extensions in as few files as possible to reduce the negative impact on performance.**
- **Allow your browser to cache your client side extensions.** If you allow your browser to cache the client side extensions, then the content does not have to be downloaded from the Oracle CRM On Demand servers each time that a user loads the page. If the client side extension changes, then you must clear your cache so that Oracle CRM On Demand loads the page containing the extension. By default, client side extensions are cached for 30 days.
- **Keep client side extensions and assets to a minimum to improve the Action bar performance.** When configuring a client side extension contained in an applet on the Action bar, the Action bar loads every time the page refreshes.
- **Follow all Web services guidelines when using client side extensions to call Web services.** For more information, see Oracle Web Services On Demand Guide.

Managing Custom HTML Head Additions

You can add custom <script> elements to the HTML <head> element of your pages. For example, within the <script> elements you can add JavaScript code that contains functions to create custom buttons on your pages. Your customized code can also reference JavaScript files that were uploaded through client side extensions or external JavaScript files, so that the functions in those files are available in your customized code. HTML head additions apply to all pages in Oracle CRM On Demand.

On the Edit Custom HTML Head Tag page, a Preview button enables you to validate any changes you have made.

You can disable the custom HTML head additions by setting the disableCustomJS=Y parameter in the URL for the page. If you navigate away from the page by clicking another link, then the URL parameter is not retained. You must specify the URL parameter each time that you require it. For more information about writing customized JavaScript code and the public application programming interfaces (API) that are available, see Oracle CRM On Demand JavaScript API Developer's Guide.

Before you begin. To perform this procedure, your role must include the Upload Client Side Extensions and Manage Custom HTML Head Tag privilege. For more information on adding privileges, see About Privileges in Roles (on page 1394).

To add a custom HTML head addition

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

2 In the Application Customization section, click Application Customization.
3 In the Application Setup section, click Custom HTML Head Tag.
4 In the Custom HTML Head Tags Detail page, click Edit.
5 In the HTML Head Additions text box, enter the <script> elements that you require.

   This field has a limit of 50,000 characters.
6 Click Preview to validate any changes you have made.
7 Click Save.

Guidelines for Referencing Client Side Extensions

Consider the following guidelines:

- **Keep the number of references to client side extensions on a page to a minimum to reduce the negative impact on performance.**
- **Keep the size of your client side extensions as small as possible.** The smaller the file that you download as part of the client side extension, the faster the page loads compared to larger files.
- **Keep all client side extensions in as few files as possible to reduce the negative impact on performance.**
- **Allow your browser to cache your client side extensions.** If you allow your browser to cache the client side extensions, then the content does not have to be downloaded from the Oracle CRM On Demand servers each time that a user loads the page. If the client side extension changes, then you must clear your cache so that Oracle CRM On Demand loads the page containing the extension. By default, client side extensions are cached for 30 days.

Related Information

See the following topic for related information:

- About Disabling Customized Code for Users (on page 1278)

Creating and Managing Action Bar and Global Header Layouts

The Action bar can contain a number of sections, such as Message Center, Search, Enhanced Keyword Search, and Recently Viewed. You can create custom layouts for the Action bar and the global header, customize the global header section, and assign these layouts to specific roles in Oracle CRM On Demand. Configuration changes to both the action bar and the global header are visible only to the roles using the modern theme. However, for roles using a classic theme, only configuration changes to the action bar layout are visible.

Making the Action Bar Unavailable to Users

By default, the Action bar appears on the left side of all Oracle CRM On Demand pages. Users can hide or show the Action bar as required. For more information, see About Showing or Hiding the Action Bar (on page 39).

If you want the Action bar to be unavailable to a certain user role, then set up an action bar layout that is empty (that is, no sections are displayed or available in the layout), and assign that layout to the user role. The Action bar is then permanently hidden from the users who have that user role.

The following procedure describes how to add an action bar layout.

To add a new action bar layout

1 In the upper-right corner of any page, click the Admin global link.
2 In the Application Customization section, click Application Customization.
3 In the Application Setup section, click Action Bar and Global Header Layout.
4 In the Action Bar Layout and Global Header Layouts page, click New Layout.
5 In the Layout Name field, enter a name for the new action bar layout.

6 In the Description field, enter a name for the new action bar layout, and click Next.
7 Choose the sections to display in the action bar layout by moving fields from the Action Bar Available Sections to the Action Bar Displayed Sections using the left and right arrows. Use the up and down arrows to change the order of the selected fields.
8 Choose the sections to display in the global header by moving sections from the Action Bar Displayed Sections to the Global Header Available Sections using the left and right arrows.
9 Click Finish.
10 (Optional) Click the Edit button to edit any of the values you entered in steps 5 to 9.

Alternatively you can copy the existing default action bar layout provided in Oracle CRM On Demand and change the description and configuration to your requirements.

To copy an action bar layout

1 In the upper-right corner of any page, click the Admin global link.
2 In the Application Customization section, click Application Customization.
3 In the Application Setup section, click Action Bar and Global Header Layout.
4 Click the Copy link to the left of Action Bar and Global Header Standard Layout.
5 In the Layout Name field, enter a name for the new action bar layout.
6 In the Description field, enter a name for the new action bar layout, and click Next.
7 Choose the sections to display in the action bar layout by moving fields from the Action Bar Available Sections to the Action Bar Displayed Sections using the left and right arrows. Use the up and down arrows to change the order of the selected fields.
8 Choose the sections to display in the global header by moving sections from the Action Bar Displayed Sections to the Global Header Available Sections using the left and right arrows.
9 Click Finish.

NOTE: To copy other action bar layouts, click the down arrow to the left of the action bar layout name to display the copy function.

To edit the global header

1 In the upper-right corner of any page, click the Admin global link.
2 In the Application Customization section, click Application Customization.
3 In the Application Setup section, click Action Bar and Global Header Layout.
4 In the Action Bar and Global Header Layout page, click the down arrow beside the required layout.
5 From the menu, select Edit Global Header.

   The Global Header Icon Edit page lists any available global header sections in ascending order. If you enter the same order value for two or more global header sections, then those global header sections are displayed in the order in which they were created.
6 Do one of the following:
   - Click New to configure the global header sections.
   - Click Edit beside the global header section that you want to edit.
7 Click the magnifying glass icon to change the icon for your section.
8 From the Applet menu, select an available section.
9 (Optional) In the Description field, enter a description.
10 In the Applet Width field, enter the width of the section.

   The maximum width of the global header section is 700 pixels.

11 In the Order field, enter the order value in which you want your section to display on the global header.

Global header sections are displayed from left to right according to the ascending order value.

12 Click Save.

Note: Global Web applets that are displayed in the global header always run, regardless of whether the Always Run check box in the My Web Applet page is selected or not. Be aware that certain Web applet content can impact performance, for example, if your Web applet references an external Web site. For more information about the Always Run check box, see Creating Global Web Applets (on page 1333).

Customizing My Homepage for Your Company

Depending on their needs, employees at your company might want to see different information on their My Homepage page. You can customize the layout of My Homepage by replacing the default content with content that is more relevant to the roles of the employees. For example, you might configure the Homepage for a customer service representative to show new service requests instead of the Recently Created Leads section that is standard on that page, and a custom service-request report instead of the standard sales pipeline quality report.

After you have customized My Homepage, you must assign the Homepage layout to a user role. All users with that role see the customized My Homepage that you set up.

Before you begin. Because you must select a role that this customization applies to, set up all your roles before starting this procedure. To perform this procedure, your role must include the Customize Application privilege and the Customize Application - Manage Homepage Customization privilege.

To customize My Homepage for your company

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

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

3 In the Application Setup section, click the My Homepage Layout link.

4 In the Homepage Layout list, do one of the following:

- Click the New Layout button to create a new layout.
- Click Edit or Copy to modify an existing custom layout.

The Homepage Layout Wizard appears to guide you through the process.

5 In Step 1 Layout Name, enter a name for the layout, and a description if required.

6 In Step 2 Homepage Layout:

- Move sections from the All Sections list to the Available Sections list.

  The Available Sections list includes the sections that can be added to a Homepage; this includes any custom reports that you have enabled for inclusion in Homepages. If you do not want a user to add a section to a Homepage, leave the section in the All Sections list.
- Move sections from the Left Side list to the Right Side list, and rearrange the information in both lists as required.

  Leave sections that are double width in the Left Side list; they will automatically stretch across the Homepage when it is displayed

7 Click Finish.

NOTE: After you add a custom homepage to the application, you need to make it available to the user role before users can see it. For instructions, see Adding Roles (on page 1396).

Enabling Custom Reports in My Homepage

You can use the My Homepage Custom Report feature to add multiple reports, including both prebuilt and custom reports, to My Homepage. These custom reports are then displayed in the All Sections list in Step 2 in the

Homepage Layout Wizard, and you can move them to the list of Available Sections or to one of the lists of sections that are displayed by default in My Homepage. For more information about customizing My Homepage, see Customizing My Homepage for Your Company (on page 1340).

NOTE: For information about where reports and dashboards can be embedded in Oracle CRM On Demand, see About Embedding Reports and Dashboards in Oracle CRM On Demand (on page 1236).

Before you begin:

The report that you want to enable in My Homepage must be stored under Shared Folders, in a folder to which you have access.

- Your role must include the Customize Application privilege and the Customize Application - Manage Homepage Customization privilege.
- To select a report from the Migrated Company Wide Shared Folder, your user role must include the Access Migrated Company Wide Shared Folder privilege.
- If the Enable Language Translation Support for Web Applets check box is selected on the company profile, then you can create custom reports only if the language that is selected in the Translation Language field is the default language for the company.

To create a My Homepage custom report

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Application Setup section, click the My Homepage Custom Reports link.
4. In the My Homepage Custom Reports list, click New Homepage Report.
5. On the Homepage Custom Report Detail page, complete the following fields.

Field	Comments
Name	Enter the name of the custom report.

Field	Comments
Mark for Translation	This check box is available only if the Enable Language Translation Support for Web Applets check box is selected on the company profile. When you create a custom report, the Mark for Translation check box is selected and read-only. Also, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Field in the list of custom reports before you update an existing custom report. If you change the name of an existing custom report in the default language for the company, then use the Mark for Translation check box as follows: ■ If you want the translated versions of the name to be replaced by the updated name, then select the Mark for Translation check box. ■ If you want the translated versions of the name to remain unchanged, then do not select the Mark for Translation check box. For more information about translating custom report names, see Translating Web Applet and Custom Report Names (on page 1291).
Height	Select Single or Double. If you set the height to Double, the report becomes twice the height of the other sections on the Homepage.
Width	Select Single or Double. If you want the report to span the entire Homepage from left to right, set the width to Double. **NOTE:** Reports that have an HTML RowSpan attribute value of more than 2 sometimes span beyond the specified size.
Execute Report Immediately	If you select this check box, the report will run automatically, and users will not have to click a link to update the report.

1. Click the Lookup icon (magnifying glass) for the Report Path field, and then navigate to the report you require in Shared Folders.

   The Report Path field is automatically populated after you select the report.

2. If you want any prompts that are configured for the analysis to be displayed so that users can filter the analysis, then select the Display Report Prompts check box.
3. Specify whether the users who view the embedded analysis can refresh, print, or export the analysis:
   - **Refresh Link.** If this check box is selected, then the Refresh link is available and users can refresh the data in the analysis.
   - **Print Link.** If this check box is selected, then the Print link is available and users can print the analysis.

- **Export Link.** If this check box is selected, then the Export link is available and users can export the analysis.

4 In the Description field, enter a description for the homepage custom report.
5 Click Save.

Renaming Record Types

To use terminology that is familiar to your users, you might want to rename record types. The default record type names in the application might not be the same as those used by your company for certain types of records. If this is the case, you can change the name to meet your specific requirements.

When you change the name of a record type, the new name appears in most places in the application, such as:

- Tabs and buttons
- Drop-down lists
- Predefined filtered lists, such as the All Accounts list on the Account Homepage
- Title bars on pages, such as on record detail and list pages
- The Create section in the Action bar
- Page section names
- Record assignment email notification
- Customized page section names

For example, you can change the Account display name to Company. The Account tab becomes Company and other section titles change accordingly.

However, there are several places in which the new name does not appear. If you change names, inform your users that the new names do not appear in:

- Custom filtered list names
- Custom field names
- Reports and Analyses
- Oracle Outlook Email Integration On Demand
- Help pages

NOTE: All display names have a maximum length of 50 characters.

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

To rename a record type

1 In the upper right corner of any page, click the Admin global link.
2 In the Application Customization section, click the Application Customization link.
3 In the Application Setup section, click the Customize Record Types link.
4 On the Customize Record Types page, type the new names in the appropriate row. You must supply all three variations for the application to use in the appropriate areas of the interface: Display Name/Singular, Display Name/Plural, and Display Name/Short.

   NOTE: The Display Name/Short appears in the tabs, so it should not exceed 15 characters. You cannot rename an object to the name of any of the objects available in the Customize Record Types page. You cannot rename an object, for example, Task or Appointment because objects are not listed in the Customize Record Types page.

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

NOTE: If you want this updated name to appear in other activated languages, select the Mark for Translation check box. In the other languages (or when you choose another language from the Translation Language drop-down list on this page), the updated name appears in blue text with brackets until you manually enter the translated versions. This helps you track what terms need to be translated. If you do not select Mark for Translation, the previously translated display names remain, unaffected by the change you made here.

6. To manually enter the translated equivalent of the new name:
   a. From the Translation Language drop-down list, select the language whose translation you want to enter.
   b. Enter the translated equivalent in the appropriate Display Name field and click Save.
   c. Click the link to return to the page you just updated and select the language again, if necessary.

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

Enabling Images on Detail Pages

You can add images to the detail page of a record type. For example, you might want to add a photo to the Contact Detail page, a company logo to the Account Detail page, or the picture of a product to the Product Detail page. You can enable images on the detail pages only for the following record types:

- Account
- Contact
- Product

To enable an image on a detail page

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Application Setup section, click the Customize Record Types link.
4. Select the Display Image check box for the Account, Contact, or Product record types.
5. Click Save.

Uploading and Managing Custom Icon Sets

You can upload and manage a set of custom icons to associate with a record type. Each custom icon set contains three icons: an icon for the record type tab, for the Action bar, and for the related information areas of Oracle CRM On Demand.

Custom icon sets improve the look-and-feel of Oracle CRM On Demand, allowing users to view icons that are more relevant for record types. You can edit an existing custom icon set and then modify it to your requirements.

NOTE: The maximum number of custom icon sets you can create is 100.

Before you begin. To perform this procedure, your role must include the Manage Custom Icons privilege. You can only associate custom icon sets with record types when using modern themes.

To create and publish a new icon set

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Application Setup section, click the Icon Management link.
4. On the Icon Management page, click the Object Icons link.
5. In the Icon Sets page, click Add to create a new icon set.
6. In the Icon Set Edit page, enter the name of the new icon set in the Icon Set Name field, and click Save.

   The maximum number of characters you can use in the Icon Set Name field is 50.

7 In the Icons tab, click New.
8 In the Icon Edit page, select one of the following from the Icon Type picklist to locate the images that you want to use in your icon set:
   - **Main Icon.** The custom icon that is used in the record type tab. It is recommended that the selected image for this icon measures 50 pixels in width by 50 pixels in height.
   - **Mini Icon.** The custom icon that is used in the Action bar. It is recommended that the selected image for this icon measures 25 pixels in width by 25 pixels in height.
   - **Related Information Icon.** The custom icon that is used in the related information area. It is recommended that the selected image for this icon measures 45 pixels in width by 45 pixels in height. If you want this image to fit in with the color scheme used in Oracle CRM On Demand, then this image must have a transparent background.

   NOTE: You can upload images with the following extensions: JPEG, JPG, PNG, or GIF. The file size limit is 100 KB.

9 Click Browse to locate the image you require, then click Save & New Icon.
10 Repeat steps 8-9 for each icon type in the custom icon set.
11 Click Publish.

   For information on associating your custom icon sets to a record type, see Changing the Icon for a Record Type (on page 1347).

Uploading and Managing Custom Global Header Icons

You can upload custom icons to associate with your global header layout. This allows you to use meaningful icons for items in your global header layout.

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

To create a new custom icon set

1 In the upper-right corner of any page, click the Admin global link.
2 In the Application Customization section, click the Application Customization link.
3 In the Application Setup section, click the Icon Management link.
4 On the Icon Management page, click the Global Header Icons link.
5 In the Global Header Icons page, click Add to create a new custom icon.
6 In the Global Header Icon Edit page, click Browse to locate the image that you want to use.

   NOTE: You can upload images with the following extensions: JPEG, JPG, PNG, or GIF. The file size limit is 100 KB. The maximum number of images you can upload is 50. If you want this image to fit in with the color scheme used in Oracle CRM On Demand, then this image must be white, it also must be approximately 45 pixels high and 45 pixels wide and have a transparent background.

7 Click Save & New Global Header Icon.
8 Repeat steps 6-7 for each custom icon you want to upload to the global header icon set.
9 (Optional) To delete a custom icon do the following:
   a Click the down arrow beside the required custom icon.
   b From the menu, select Delete.

For information on global header layouts, see Creating and Managing Action Bar and Global Header Layouts. (see Creating and Managing Action Bar and Global Header Layouts on page 1338) (see Changing the Icon for a Record Type on page 1347)

Adding Record Types

You can add custom record types for your company. For example, you might want to display an Order tab for your employees to use. To add a new record type, you rename and configure one of the custom object record types in Oracle CRM On Demand.

The privileges that allow your company to use the Custom Object 01 through Custom Object 10 record types and to give users access to those record types are enabled by default for the Administrator role in Oracle CRM On Demand. However, if your company needs to use more than 10 custom object record types, then you must contact Oracle CRM On Demand Customer Care to ask to have the additional custom object record types made available to your company.

In general, new record types work in the same way as the record types that are provided by default. A set of fields is available for each record type, including a Name field that can be used for filtering and sorting lists.

NOTE: For each of the Custom Object 01, 02, and 03 record types, eight fields are available for filtering and sorting lists of records of these record types. For all other custom object record types, only the Name field can be used for filtering and sorting lists of records of that record type.

You can set up custom fields, page layouts, search layouts, and so on for the new record types. However, you cannot use the new record types in the following areas:

- Assignment Manager
- Forecasting
- Default Group Assignment (they cannot be shared through groups)

In addition, new record types have these restrictions:

- New record types cannot contain the country-specific address groups
- By default, only the Name field is required in new record types
- No duplicate checking is performed on the new record type

For information about using Web services with new record types, see Downloading WSDL and Schema Files (on page 1839).

Before you begin. To perform this procedure, your role must include both the Customize Application privilege and the appropriate Customize Application privilege for the custom object you are using for your new record type. There are individual privileges for the Custom Object 01, 02, and 03 record types, for example, the Customize Application - Manage Custom Object 01 privilege. For other custom object record types, each privilege applies to a group of custom objects, for example, the Customize Application - Manage Custom Objects 04-10 privilege.

To add a record type

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Application Setup section, click the Customize Record Types link.
4. In the row for the custom object record type that you are using, fill in the information, for example, enter Order.

   For more information, see Renaming Record Types (on page 1343). After you rename the record type, it appears under its new name in the Record Type Setup sections on the Application Customization page, replacing the link for the custom object record type.
5. Click Save.
6. In the Record Type Setup section on the Application Customization page, click the link for the new record type.
7. In the Field Management section, click the Field Setup link.
8. On the Field Setup page, you can do the following:

- (Recommended) Click Manage Field Labels and rename the fields to meet your requirements.

  It is recommended that you rename the Name field. Throughout the application, each record type has a field called Name, which is preceded by the record type (Account Name, Opportunity Name, and so on). Therefore, if you are adding a record type named Order, you might relabel the Name field to Order Name. If your company uses Targeted Search, then the Name field appears by default as a search field in the Search section of the Action bar.

  NOTE: For the Custom Objects 01 through 03 record types only, the Quick Search 1 and Quick Search 2 fields also appear as search fields by default in the Search section of the Action bar, so you might want to rename the Quick Search 1 and Quick Search 2 fields. For example, if you are adding a record type named Order, then you might want to rename the Quick Search 1 field as Order Number. Then, when an employee selects Order from the list of record types in the Search section, Order Number appears as one of the search fields.

- Click New Fields and add custom fields.

  The same restrictions exist for these record types as for custom fields for the default record types.

For more information about editing fields and creating custom fields, see Creating and Editing Fields (on page 1219).

9 Set up the page layouts for the Edit and Detail pages for the new record type.

  You can add fields to the record Edit pages, group the fields into separate sections, and rename those sections.

  To create relationships with other record types, add the fields (Account, Contact, Opportunity, and so on) to the page layouts. This creates a Lookup icon next to the field, where users can link existing records to this new record type.

  You can add related information sections to the Detail pages.

  When you add Team as a related information section, users can share this record with team members on a record-by-record basis.

  NOTE: The Team related information section is supported for all custom object record types.

  For instructions, see Customizing Static Page Layouts (on page 1267).

10 (Optional) Set up search layouts for the new record type. For more information, see Managing Search Layouts (on page 1296).

11 (Optional) Set up custom Homepage layouts for the new record type. For more information, see Creating Record Homepage Layouts (on page 1305).

12 (Optional) Add the new record type as a field or as a related information section in the page layouts for other record types.

NOTE: After you finish setting up the new record type, you must update the relevant access profiles to give the users the appropriate access levels for the new record type. You must also update the relevant user roles to make the tab for the record type available to the roles, and to assign your customized page layouts, Homepage layouts, and search layouts for the record type to the roles. For information about updating access profiles, see Process of Setting Up Access Profiles (on page 1416). For information about updating roles, see Adding Roles (on page 1396).

Related Topics

See the following topic for related information:

- About Many-to-Many Relationships for Custom Objects (on page 1359)

Changing the Icon for a Record Type

You can change the icon that is associated with a record type, and which is displayed on tabs and in the Create section in the action bar.

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

To change the icon for a record type

1 In the upper-right corner of any page, click the Admin global link.
2 In the Application Customization section, click the Application Customization link.
3 In the Application Setup section, click the Customize Record Types link.
4 On the Customize Record Types page, do one or both of the following:
   a Click the Lookup icon in the Classic Icon field for the record type and select an icon from the window.
   b Click the Lookup icon in the Modern Icon field for the record type and select an icon from the window.
   If you have created any custom icon sets, they are displayed under the Custom Icons heading. For more information about custom icon sets, see Uploading and Managing Custom Icon Sets (on page 1344).
5 Click Save.

Customizing REST Integration Tags

Each record type has two REST integration tags that can be used by Oracle CRM On Demand REST API to access the record type (resource). One of the REST integration tags is the default tag for the record type. The default tag is language-independent and you cannot change it. You can customize the other REST integration tag. For example, if your company renames a record type or uses a custom record type, then you might want to customize the REST integration tag for that record type, so that the REST integration tag reflects the name of the record type.

An Oracle CRM On Demand REST API URL can access a resource using either of the REST integration tags, as shown in the following example URLs:

`http://server/OnDemand/user/Rest/latest/`*`default_integration_tag`*

`http://server/OnDemand/user/Rest/latest/`*`custom_integration_tag`*

In these examples, default_integration_tag is a placeholder for the default integration tag, and custom_integration_tag is a placeholder for the customized REST integration tag.

The following procedure describes how to customize the REST API integration tags that you use in REST API URLs.

To customize REST integration tags

1 In the upper-right corner of any page, click the Admin global link.
2 In the Application Customization section, click Application Customization.
3 Click the Customize REST Integration Tags link.
4 In the REST Integration Tags list, click the Edit link for the record type.
5 In the REST Integration Tag field, enter the new name and click Save.

Creating New Themes

The theme determines the appearance of Oracle CRM On Demand. Several predefined themes are available when Oracle CRM On Demand is first set up for a new company, the default theme is *Oracle.* You can specify which roles can create and manage themes in the Role Management Wizard. For more information on adding roles, see Adding Roles (on page 1396). For more information on specifying themes at the company level, see Setting Up Your Company Profile and Global Defaults (on page 1123).

You can choose a theme at the company, role, or user level. The theme specified at the user level takes precedence, followed by the theme specified at the role level. The company default theme is applied if neither the user level nor the role level specifies a theme.

If you are upgrading themes from Oracle CRM On Demand Release 16 to a later release, note the following:

- **For new companies.** *Oracle* is the default theme at the company level. No theme is selected at the role or user level. Company administrators can create new themes and set them as the default. They can also disable existing themes so that they cannot be selected by users.
- **For existing companies.** The names of any old themes will be replaced by the following strings: *Oracle - Deprecated*, *Contemporary - Deprecated*, or *Classic - Deprecated*. It is recommended that you change these old themes, choose one of the new themes, and remove the old themes from the user profiles.
- **For existing companies that use logos and links.** An upgrade does not affect a deprecated theme, which is still selected. However, it is recommended that you do not use old (deprecated) themes, but create new themes, and set new themes as the default at the company or role level.

Before you begin. To create and edit themes, your user role must include the Manage Themes privilege.

The following task describes how to create your own theme in Oracle CRM On Demand.

To create a new theme in Oracle CRM On Demand

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click the Application Customization link.
3. In the Application Setup section, click the Themes link.
4. In the Themes page, click New.
5. Enter information for the following fields:
   - **Theme Name.** Enter a name for your new theme.
   - **Show Default Help Link.** Select this check box if you want your new theme to display the default Help link.
   - **Show Default Training and Support Link.** Select this check box if you want your new theme to display the default Training and Support link.
   - **Show Default Deleted Items Link**. Select this check box if you want your new theme to display the default Deleted Items global link.
   - **Support Head-Up Display Settings**. Select this check box if you want your new theme to support the head-up display. You can remove the head-up display completely by deselecting this check box on a user's theme.

     NOTE: In addition to your theme supporting the head-up display functionality, users need to enable the Head-Up Display option in the Personal Detail page. If the Head-up Display field in the user's personal profile is blank, then the setting for the company is used. For more information on the head-up display, see Oracle CRM On Demand Page-by-Page Overview (on page 35) and Updating Your Personal Details (on page 734).
   - **Description.** Enter a description for your new theme.
   - **Theme Style.** This field is required. The default value for this menu is Classic.
   - **Tab Style.** Select Classic or Modern. This menu is available only if you select Classic from the Theme Style menu. The default value for this menu is Stacked.
   - **Font Size.** Select Regular or Large. If you select Classic from the Theme Style menu, then the default value for this menu is Regular. If you select Modern from the Theme Style menu, then the default value for this menu is Large.
6. Click Save.

Oracle CRM On Demand opens the Theme Detail page with a dynamic preview of the new theme, which is to the right of the screen. The preview shows the Home, Detail, List, and Calendar pages, with the new theme applied.

7 Enter information for the fields listed in the following table.

NOTE: To enter new color codes, you can either enter a hexadecimal value for each color, or move the mouse over the default color value to display the color palette icon. Click the color palette icon to select a color for this field.

General Information	Description
Show Default Help Link.	Select this check box if you want your new theme to display the default Help link.
Show Default Training and Support Link.	Select this check box if you want your new theme to display the default Training and Support link.
Show Record Type Links in the Footer Section	Select this check box if you want your new theme to display the record type links at the bottom of the page.
Support Head-Up Display Settings	Select this check box if you want your new theme to support the head-up display. You can remove the head-up display completely by deselecting this check box on a user's theme. **NOTE:** In addition to your theme supporting the head-up display functionality, users need to enable the Head-Up Display option in the Personal Detail page. If the Head-up Display field in the user's personal profile is blank, then the setting for the company is used. For more information on the head-up display , see Oracle CRM On Demand Page-by-Page Overview (on page 35) and Updating Your Personal Details (on page 734).
Application Background	This field refers to the background of Oracle CRM On Demand. In the modern theme, this field also refers to the background of the Top section where the buttons are displayed.
Application Text	This field is available for the classic theme only. It refers to the legal statement, which is at the bottom of the application page, and the vertical bars between the global links and tab links.
Application Links	This field is available for the classic theme only. It refers to the global links, which are at the top and bottom of Oracle CRM On Demand, for example, Admin, My Setup, Privacy Statement, Terms of Use, and so on.

General Information	Description
Alert Text	This field refers to the text used for mandatory fields and overdue tasks. This field also refers to the text in the scrolling text bar that might be displayed at the bottom of each page in Oracle CRM On Demand, depending on how the company-wide alerts are set up.
Alert Bar Background	This field refers to the background for the scrolling text bar that might be displayed at the bottom of each page in Oracle CRM On Demand, depending on how the company-wide alerts are set up.
Tabs (Classic Theme Only)	
Tab Style	Select Rounded, Stacked, or Straight from the menu.
Active Tab Text	This field refers to the text used in the active tabs.
Active Tab Background	This field refers to the background color of the active tab.
Inactive Tab Text	This field refers to the text used in the inactive tabs.
Inactive Tab Background - Top	This field refers to the color of the upper background of the inactive tab.
Inactive Tab Background - Bottom	This field refers to the color of the lower background of the inactive tab.
Inactive Tab Background Hover	This field refers to the color displayed when you place the mouse over an inactive tab. It also refers to the color used in the menu tab.
Global Header Section (Modern Theme Only)	
Background	This field refers to the background color of the global header.
Top Section (Modern Theme Only)	
Text	This field refers to the text under the buttons.
Action Bar (Modern Theme Only)	

General Information	Description
Action Bar Icon	This field refers to the color of the Action bar triangle icon.
Action Bar Text	This field refers to the text used in the Action bar.
Action Bar Links	This field refers to the links available in the Action bar, for example, the navigation links underneath the Favorite Records or Recently Viewed sections.
Action Bar Background	This field refers to the background color displayed in the Action bar.
Buttons (Modern Theme Only)	
Button Background - Top	This field refers to the color of the upper background of the button.
Button Background - Bottom	This field refers to the color of the lower background of the button.
Button Border	This field refers to the color used in the border of the button border.
Button Text	This field refers to the text used in the button.
Page (Classic and Modern Themes)	
Page Text	This field refers to all the text on the page or pop-up window, for example, inline help, field labels, field values, page titles, inactive links, form section headers, vertical bars, bullets, and so on.
Page Links	This field refers to all the links on the page background, for example, Show Full List link, Manage List link, and so on.
Page Background - Top	This field refers to the color of the title bar at the top of each page and pop-up window, for example, Opportunity Details. Buttons are placed on this bar. This field also controls the Action bar, Related List, and Calendar Appointment pane. In the classic theme, this field controls the active calendar tab. **NOTE:** In the modern theme, the active calendar tab is replaced by a menu.

General Information	Description
Page Background - Bottom	This field refers to the color of the title bar at the bottom of each page and pop-up window, for example, Opportunity Details. Buttons are placed on this bar. This field also controls the Action bar, Related List, Calendar view, and active Calendar tab.
Highlighted Page Background	This field refers to the color of the highlighted items on a page, for example, the inline edit fields, the current day on a calendar, active step in wizards, head-up display background, and so on.
Page Header Text	This field refers to the text color used for the page names, for example, Opportunities Homepage.
Page Header Background - Top	This field refers to the color used for the upper area behind the page names.
Page Header Background - Bottom	This field refers to the color used for the lower area behind the page names.
Section Header Lines	This field refers to the section header lines on Detail pages.
Page Lines	This field refers to the line colors used in the list records, form sections on detail pages, in wizard steps, and so on.
Page Icon	This field is available for the modern theme only. It refers to the color used on the triangle icon, which is used to collapse and expand page sections.
Related Information Button Background	This field is available for the modern theme only. It refers to the colors used behind the Related Information button.
Lists (Classic and Modern Themes)	
List Header Text	This field refers to the text color used on the filter bar, the list footer bar, and in the time line of daily and weekly calendar views.
List Header Background	This field refers to the background color of the time section in the daily and weekly calendar views, filter bar, and the list footer that contains the list navigation icons.

General Information	Description
Column Header Text	This field refers to the text color used in the column headers, and in the day section of the calendar views in the modern theme.
Column Header Background	This field refers to the background color on the related lists, full lists, and in the day section of the calendar views in the modern theme.
Lines	This field refers to the color of the horizontal lines within the list section.
Calendar (Classic and Modern Theme)	
Appointment Background - Default	This field refers to the background color of an appointment displayed in daily, weekly and monthly views of the calendar.
Appointment Text - Links	This field refers to the links available in the calendar appointments, for example, the navigation links for the appointment, contact and account.
Appointment Text - Non Links	This field refers to the text color used in appointments.
Non Working Hours Background	This field refers to the background color used to represent the hours in a calendar during which the user is not working.
Calendar Lines	This field refers to the line colors used in calendar views and in the Calendar View section of calendar pages.

8 (Optional) If you want to add customized global links to your theme, click New in the Global Links section.

The Link Edit page opens.

9 Enter the following information:

- **Link Name.** Enter the name of the global link that you want to add to your theme.
- **Type.** Select Header or Footer from the menu, depending on whether you want to place your global link at the top or bottom of your page.
- **Link URL.** Enter the URL of your global link.
- **Link Order.** Enter a value to indicate the order in which the link is displayed. For example, if you enter the number one, the link is the first link in your global links.

10 Click Save. Or, if you want to add additional customized global links to your theme, click Save & New Link.

11 (Optional) If you want to add a specific logo to your theme, click Add Logo in the Logo section.

The Logo Edit page opens.

12 Click Browse to locate the image that you want to use as the header logo in your theme.

NOTE: You can upload images to use as a header logo with the following extensions: JPEG, JPG, PNG, or GIF. For the classic theme, Oracle CRM On Demand can display a header logo that is a maximum 45 pixels high. For the modern theme, Oracle CRM On Demand can display a header logo that is a maximum 50 pixels high. To ensure maximum coverage horizontally, it is recommended that the header logo is 1680 pixels wide. You must have permission to use and upload the image that you upload to your theme.

13 Enter the following information:

- **Name.** Enter the name of the logo that you want to add to your theme.
- **Logo Type.** Select Header or Footer from the menu, depending on whether you want to place your logo at the top or bottom of your page. If you select Header, your logo remains in the background behind the links and tabs. If you select Footer, the footer logo is placed at the links at the bottom of the application.

14 Click Save.

NOTE: You must sign out and sign in again to Oracle CRM On Demand to view the preview of the new logo that you added to the theme.

15 (Optional) If you want to specify different colors for the background, links, and text for the different types of activities, then click New in the Calendar Activities section.

The Calendar Activities Detail page opens.

16 Enter the following information:

- **Activity Type.** Select the required calendar activity.
- **Order.** Enter a value to indicate the order in which the calendar activities are displayed in the calendar legend. The calendar legend displays the first four activity types when you view the daily and weekly calendar. The calendar legend displays the first six activity types when you view the monthly calendar.

17 Click Save. Or, if you want to specify colors for other types of activities, then click Save & New Calendar Activities.

The Calendar Activities section lists the activities which you want to display in specific colors in your calendar.

18 Click the following fields to define how each calendar activity is displayed in your calendar:

- **Background Color.** Enter a hexadecimal value, or select a color from the color palette, to define the background color of your calendar activity.
- **Links Color.** Enter a hexadecimal value, or select a color from the color palette, to define the color in which links are displayed in your calendar activity.
- **Non Links Color.** Enter a hexadecimal value, or select a color from the color palette, to define the color in which text is displayed in your calendar activity.

NOTE: You must sign out and sign in again to Oracle CRM On Demand to view the changes to your calendar activities. For more information on using your calendar in Oracle CRM On Demand, see Working with the Calendar Pages (on page 194).

Customizing Previous Ownership for Shared Records

For record types for which sharing of records by a team is supported, you can customize that record type so that you retain the previous owner as part of the team when the Owner field is changed in Oracle CRM On Demand. The Customize Previous Owner page displays a list of record types that support record sharing by a team. For each record type, you can select the channels for which the previous owner of the record is retained in the team, and you can assign a new access role to the previous owner. For example, you can configure the Account record type so that when the owner of a shared account record is changed through interactive operations, the previous owner is retained in the team, and the previous owner is assigned a read-only access role for that record type.

For more information on ownership of records, see Transferring Ownership of Records (on page 145) and Sharing Records (Teams) (on page 146).

To customize previous ownership of records

1 In the upper-right corner of any page, click the Admin global link.
2 In the Application Customization section, click the Application Customization link.
3 In the Application Setup section, click Customize Previous Owner.

   The Customize Previous Owner page lists record types that support sharing of records by teams, and the corresponding channels and access profiles for those record types.
4 In the Customize Previous Owner page, click Edit to modify a channel or access profile for the previous owner of a record type.
5 From Select Channels, select one of the following:
   - **Never Retain Owner.** This is the default value. The previous owner of the record will not be retained in the team.
   - **Always Retain Owner.** The previous owner of the record will be retained in the team, except when the owner is changed using the assignment manager.
   - **All Interactive Operations.** The previous owner of the record will be retained in the team, except when the owner is changed using the Import Assistant, the assignment manager, the mass update feature, or Web services.
6 From Access Profile, select a new access profile for the previous owner.

   For more information on making other access profiles available for teams, see Process of Setting Up Access Profiles (on page 1416).
7 Click Save.

About Fields, Picklists, and Metrics

The application does not allow you to change field names or picklist values that it uses for forecasting and reports. However, some of the prebuilt lists, such as lists on Homepages, select records to include based on the picklist values. The application uses the underlying, language-independent code to determine what records to include in the standard lists. Therefore, you can rename picklist values and fields without affecting those lists.

NOTE: In Oracle CRM On Demand (the standard application), the priority of tasks is indicated in task lists by arrows. An up arrow indicates 1-High priority, no arrow indicates 2-Medium priority, and a down arrow indicates 3-Low priority. If you change the display values for the Priority field in the Activity record type from the default values (for example, from the default value of *1-High* to a value of *Highest*), then Oracle CRM On Demand does not display arrows in the Priority field for the task lists unless you use the following patterns: 1-*label*, 2-*label*, or 3-*label*, where *label* is the name that you give to the task priority. In this case, Oracle CRM On Demand displays an up arrow for 1-*label*, no arrow for 2-*label*, a down arrow for 3-*label*, and no arrow for any other display values. For example, Oracle CRM On Demand displays an up arrow for a value of *1-My Highest*, but it displays no arrow for a value of *My Highest*. Oracle CRM On Demand displays no arrows for any custom values that you add to the picklist for the Priority field.

About Attachment Configurations

Depending on the record type, files can be attached to records in the following ways:

- Through the Attachments related item on parent records
- Through attachment fields

About Configuring the Attachments Related Item

On record types that support the preconfigured Attachments related item, you can configure page layouts and user roles to allow users to link multiple attachments to a parent record. Each attachment item can contain either a file or a URL. To allow users to attach files and URLs in this way, the page layouts and user roles must be configured as follows:

- The Attachments section must be available as a related information section on the page layout for the parent record type.

- The user role must have the necessary permissions for the Attachment record type.
- The access profiles for the user role must have the appropriate access to the Attachments related record type in the access setting for the parent record type.

For more information about customizing page layouts, see Customizing Static Page Layouts (on page 1267) and Specifying Dynamic Page Layouts (on page 1314). For more information about configuring user roles and access profiles, see User Management and Access Controls (on page 1361).

The following record types support the preconfigured Attachments related item:

- Account
- Activity
- Campaign
- Contact
- Custom Objects 01, 02, and 03
- Dealer
- Event
- Fund
- Fund Request
- Household
- Lead
- Opportunity
- Partner
- Program Membership
- Service Request
- Solution

Attachments can also be linked to alert records and sales stage records.

Company administrators can view details of attachments added through the preconfigured Attachments related item. For more information, see Managing Your Company's Attachments (on page 1862).

About Configuring Attachment Fields

Attachment fields allow users to attach a single file to a record. Attachment fields are supported for the following record types:

- Custom Objects 01, 02, 03, 04, and higher
- Inventory Audit Report
- Sample Transaction
- Signature

The following record types also support attachment fields. However, these record types can be used only as related items, as follows:

- Accreditation Attachment

  The Accreditation Attachment record type can be made available as a related item on the Accreditation record type only.
- Application Attachment

  The Application Attachment record type can be made available as a related item on the Application record type only.
- Business Plan Attachment

  The Business Plan Attachment record type can be made available as a related item on the Business Plan record type only.

- Certification Attachment

  The Certification Attachment record type can be made available as a related item on the Certification record type only.
- Course Attachment

  The Course Attachment record type can be made available as a related item on the Course record type only.
- Exam Attachment

  The Exam Attachment record type can be made available as a related item on the Exam record type only.
- MDF Request Attachment

  The MDF Request Attachment record type can be made available as a related item on the MDF Request record type only.
- Objective Attachment

  The Objective Attachment record type can be made available as a related item on the Objective record type only.
- Partner Program Attachment

  The Partner Program Attachment record type can be made available as a related item on the Partner Program record type only.
- Policy Attachment

  The Policy Attachment record type can be made available as a related item on the Policy record type only.
- Special Pricing Request Attachment

  The Special Pricing Request Attachment record type can be made available as a related item on the Special Pricing Request record type only.

Some of these record types are industry-specific or specific to Oracle CRM On Demand Partner Relationship Management Edition and might not be available in your edition of Oracle CRM On Demand.

On some of these record types, the attachment fields are exposed on the standard page layout in Oracle CRM On Demand. You can expose the attachment fields on the Detail page layouts for all of the listed record types, as required. There are three attachment fields, as follows:

- **Attachment.** This field initially shows a paper clip icon on the record Edit page. After a file is uploaded, the field shows the name and size of the attachment file on the record Detail page. On the record Edit page, the field also shows the paper clip icon and an X icon that can be used to remove the file. To allow users to attach a file to a record, you must expose this field on the page layout. The Attachment field cannot be used as a search field, because the file name and file size in this field are calculated values.
- **Attachment: File Name.** This is a read-only field that is automatically populated with the name of the file the user uploads. The Attachment: File Name field can be used as a search field. Exposing this field is optional.
- **Attachment: Size (In Bytes).** This field displays the size of the attachment. Exposing this field is optional.

For more information about customizing page layouts, see Customizing Static Page Layouts (on page 1267) and Specifying Dynamic Page Layouts (on page 1314).

About Configuring Custom Objects and Attachment Fields

You can configure the Custom Object record types in a number of ways to meet your company's business needs, as follows:

- You can configure a Custom Object record type as a related record type on another record type. (Custom Object record types are supported as related record types on most of the main record types in Oracle CRM On Demand.)

  In such a configuration, there is a one-to-many relationship between the parent record and the linked record type. When the attachment fields are exposed on the linked record type, this configuration allows users to link multiple attachments (one on each child record) to the parent record.

For example, you can expose the attachment fields on the Detail page for Custom Object 04, and then rename Custom Object 04 so that it is labeled *Objective Attachment*. Then, you can make the new Objective Attachment record type available as a related information section on the Objective record type.

- You can configure Custom Object record types in many-to-many relationships with other record types, see About Many-to-Many Relationships for Custom Objects (on page 1359) for more information.
- You can configure a Custom Object record type for use as an attachment record type and make it available as a top-level record type, with its own tab, homepage, lists, and so on.

  Such a configuration could be used to give users access to literature that is of interest to a large number of users and would also allow users to search for attachments that were uploaded to records of the custom attachment record type.

As with any record type, you must ensure that users have the appropriate access levels in their user roles and access profiles to allow them to work with the record types where attachment fields are supported. For more information about configuring user roles and access profiles, see User Management and Access Controls (on page 1361).

About Many-to-Many Relationships for Custom Objects

By default, all relationships between Custom Objects 01, 02, and 03 and other record types are many-to-many. However, for all other custom object record types (for example, Custom Object 04), any relationship between the custom object record type and any other record type (including other custom object record types) is one-to-many by default.

You can create many-to-many relationships for custom object record types by using another custom object record type as an intersection table.

Advantages of Using a Custom Object Record Type as an Intersection Table

Using a custom object record type as an intersection table, rather than using the many-to-many relationships with other record types provided within Custom Objects 01 to 03, has the following advantages:

- **Flexibility.** You have more flexibility to control the relationship between the objects. Using a custom record type as an intersection table allows direct access to the intersection records in the custom object record type. Custom Objects 01, 02, and 03 do not expose the intersection tables and their many-to-many relationships with other record types. Therefore, users cannot view or modify the intersection records. Custom Object 04 and higher record types are also more flexible because they allow you to determine which record types should have the many-to-many relationship. The many-to-many relationships of Custom Objects 01, 02, and 03 with other record types are preconfigured, and you cannot change them. For example, when using Custom Object 01, and if you require only one-to-many relationships between Custom Object 01 and Account, then it is stored as a many-to-many relationship. Custom Object 01 uses an additional record to store the relationship in the hidden intersection table even if it is not necessary, and this additional record is counted towards your company's record allotment. However, if you are using Custom Object 04, and if you require only a one-to-many relationship between Custom Object 04 and Account, then you can use the default one-to-many relationship provided. Otherwise, if you are not using Custom Object 04, then you can choose to use another custom object record type to create a many-to-many relationship between Custom Object 04 and Account.
- **Better integration.** Integration events are more efficient when you use a custom object record type as an intersection table. You can load many-to-many relationships directly into the custom object record type by using either the import tool in Oracle CRM On Demand or Web services. However, the import tool does not support importing relationships between Custom Objects 01, 02, and 03 and other record types. Also, integration events can track only the parent fields of Custom Objects 01, 02, and 03. Integration events cannot track any event that occurs for Custom Objects 01, 02, and 03 and their related record types, such as an association or dissociation with other record types. However, if you are using Custom Object 04 and higher record types as intersection tables, then you can track and detect any events that occur in the intersection table because it is a custom object record type with integration-event support.

- **Storing additional information.** You might want to store additional information about the many-to-many relationships between two record types, for example, a text field or more complex business model might require relationships with other record types. Custom Object 04 and higher record types support all custom fields available in Oracle CRM On Demand, enabling you to create custom fields in the intersection table. Custom Object 04 and higher record types also support relationships with other record types, allowing you to create relationships with the intersection table. Intersection tables for Custom Objects 01, 02, and 03 and other record types do not support custom fields or relationships with other record types.

Example of Creating a Many-to-Many Relationship

Your company owns and manages conference centers, and provides conferencing facilities to other companies, government clients, and so on. You want to use a custom object record type to track information about events and another custom object record type to track information about the rooms that are used for each event. Each room is used for many events, and each event can use a number of rooms, so that you must have a many-to-many relationship between the record types.

To create this many-to-many relationship, you can use a third custom object record type as an intersection table to track information about each room booking, or session. You can then create a one-to-many relationship between rooms and sessions, and a one-to-many relationship between events and sessions, which gives you a many-to-many relationship between rooms and events.

The following procedure describes how to configure the record types and relationships for this example. Custom Objects 04, 05, and 06 are used for the new record types.

To configure a many-to-many relationship

1. If the custom object record types that you want to use are not set up for your company, contact Customer Care to have them set up.
2. When Customer Care has set up the custom objects, rename Custom Object 04, 05, and 06 record types to Room, Event, and Session respectively.

   For information about renaming record types, see Renaming Record Types (on page 1343).
3. For each user role that requires access to the new record types, set the required level of access in Step 2 Record Type Access of the Role Management Wizard. (The required level of access is determined by you, based on user responsibilities.)

   For information about setting up user roles, see Adding Roles (on page 1396).
4. For each user role that requires access to the new record types, configure the access profile for the new record types.

   At a minimum, you must set up the following:

   - On the new Room record type, grant View access to the new Session related information section.
   - On the new Event record type, grant View access to the new Session related information section.

   For more information about setting up access profiles, see Process of Setting Up Access Profiles (on page 1416).
5. Create new page layouts for the new record types:

   - On the new Room record type Detail page layout, include the new Session record type as a related information section.
   - On the new Event record type Detail page layout, include the new Session record type as a related information section.

   For more information on setting up page layouts, see Customizing Static Page Layouts (on page 1267).
6. For each user role that requires access to the new record types, assign the page layouts that you created in Step 6 of the Role Management Wizard.

   For information about setting up user roles, see Adding Roles (on page 1396).

NOTE: In addition to the configuration changes described in the preceding procedure, you can customize the new record types in the same way that you customize other record types. For information about customizing record types, see Record Type Application Customization Page (on page 1199).

User Management and Access Controls

This topic provides information on managing users and controlling access.

Before you begin. Do the following:

- Make sure that you have the appropriate privileges in your user role:
  - To access the User Management and Access Controls link on the Admin Homepage, your user role must include the Manage Users privilege, or the Manage Roles and Access privilege, or both of these privileges.
  - To set up users, your role must include the Manage Users privilege or the Manage Users within the Partner Organization privilege.

    NOTE: Users who have the Manage Users within the Partner Organization privilege can set up users in their own partner organization only.

  - To set up access profiles and roles at your company, your role must include the Manage Roles and Access privilege.
  - To create, edit, or delete a group, your user role must include the Manage Roles and Access privilege. To add users to a group or remove users from a group, your user role must include both the Manage Roles and Access privilege and the Manage Users privilege.
  - To set up books, your role must include the Manage Books privilege.
  - To set up territories at your company, your role must include the Manage Territories privilege.
- Compare the number of licenses against the number of users that must be active. Only active users can access Oracle CRM On Demand. The total number of active users cannot exceed the number of licenses for your company. For more information on verifying the status of licenses, see Verifying License Statuses and Active Users (on page 1151).
- Read the background information on roles and access profiles. See the following topics for more information:

  - Role Management (on page 1389)
  - Guidelines for Setting Up Roles (on page 1390)
  - Access Profile Management (on page 1403)
  - About Access Levels for Primary Record Types (on page 1409)
  - About Access Levels for Related Record Types (on page 1410)
  - How Access Rights Are Determined (on page 1464)

- Determine what profiles you will use to manage data access for books, roles and teams.
- Determine the role that you want to assign to each user and to whom each user reports. If your organization requires additional roles to accommodate multiple lines of business, create the new ones that you require.

The cumulative setup of all users at your company defines your company's reporting hierarchy and sales quotas.

Individually, for each user at your company, you must specify a user role. A user's role and associated access profile determine an employee's access to tabs, features, and records. They also determine which page layouts the employee sees when using the application.

Click a topic to see the procedure for managing users, access profiles, roles, custom books, and groups:

- Setting Up Users (on page 1363)
- Setting Up Users' Sales Quotas (on page 1377)
- Setting Up Default Books by Record Type for a User (on page 1377)
- Changing a User's User ID (on page 1378)

TIP: Consider setting up a test user for each role. Then activate the test users to make sure the configurations are set up correctly before activating other users. Do not activate other users until you have completed all user setup activities, including access rights, role layout, reporting and data sharing hierarchy, workflow and any other business process customization. Remember to deactivate test users when testing is complete.

User Management

A user is an entity in Oracle CRM On Demand with or without the ability to interact with Oracle CRM On Demand. For example, a user can be an employee in your company, a partner, or an external application. Users can be active or inactive. Active users can interact with Oracle CRM On Demand: inactive users cannot. To interact with Oracle CRM On Demand, an active user must be authenticated according to the sign-in and password policies set up for your company. For more information about sign-in and password policies, see About Sign-In and Password Policies (on page 1151).

Each user has one assigned role. The same role can be assigned to multiple users. A role in Oracle CRM On Demand is similar to a business function that a user performs within an 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, a role defines the following:

- The features in Oracle CRM On Demand that a user has the privileges to use
- The set of permissions that a user is given to work with protected information
- The user interface settings that display information

For more information about roles, see Role Management (on page 1389). To manage users, do the following tasks:

- Setting Up Users (on page 1363)
- Setting Up Users' Sales Quotas (on page 1377)
- Changing a User's User ID (on page 1378)
- Resetting a User's Password (on page 1379)
- Resetting a User's DMS PIN (on page 1379)
- Changing the Primary Division for a User (on page 1380)
- Reviewing Sign-In Activity for a User (on page 1380)
- Reviewing Security-Related Activities for Users (on page 1380)
- Managing Delegated Users (Administrator) (on page 1382)
- Creating Inventory Periods for Users (on page 1384)
- Deactivating Users (on page 1384)

Related Topics

See the following topics for related information about user management:

- About User Page Layouts (on page 1376)
- About User Delegation (on page 1381)
- User Fields (on page 1365)
- Viewing Audit Trails for Records (on page 175)
- Customizing the Audit Trail (on page 1306)

Setting Up Users

When setting up a user, the following fields require special care, because they determine what the user can access, view, and do:

- **Status field.** When you first set up a user, you can allow the user to access Oracle CRM On Demand immediately by setting the user's status to Active and prompting Oracle CRM On Demand to send the necessary sign-in information to the user when you save the user record, by selecting the appropriate option on the user record.

  Alternatively, if you do not want the user to access Oracle CRM On Demand until a later time, set up the user record, and set the user's status to Inactive. When you later want to allow the user to access Oracle CRM On Demand, change the status of the user to Active, and use the reset password functionality to send the necessary sign-in information to the user by email.
- **Reports To field or Reports To (Alias) field.** The reporting structure determines whose records the managers can access. It also determines whose data is included in calculations for forecasting as well as reports for managers and executives. The page where you set up users can contain either the Reports To field or the Reports To (Alias) field, but must not contain both of these fields. For more information about the Reports To and Reports To (Alias) fields, see About the Reports To and Reports To (Alias) Fields on User Records (on page 1377).

  TIP: Enter users who are at the top of the reporting hierarchy first.
- **Role field.** The user's role determines the user's access to tabs, features, records, and page layouts.

NOTE: You can import your user records using the import assistant. For more information about this option, see Import and Export Tools (on page 1610).

About Sign-In Information for New Users

To sign in to Oracle CRM On Demand, a new user must have a temporary URL for Oracle CRM On Demand and a temporary password. You can prompt Oracle CRM On Demand to send the sign-in information to the user at the time that you create the user account, or you can do it at a later time, as follows:

- If you want to send the sign-in information at the time that you set up the user account, select the email check box on the user record before you save the user record for the first time.

  Depending on whether you use the Quick Add button or the Add User button to create the user record, the email check boxes are named as follows:

  - The Email check box on the Quick Add page
  - The Email Temporary Password When I Click Save check box on the User Edit page

  Note that you must select the check box before you save the record for the first time if you want the information to be sent to the user immediately. The sign-in information is sent to the user by email, in two parts:

  - One email contains a temporary URL.
  - The second email contains a temporary password and details of the user's sign-in ID.
- If you want to send the sign-in information to the user at a later time, do not select the email check box when you create the user record.

  Later, when you want to send the sign-in information to the user, you can prompt Oracle CRM On Demand to send the information by clicking the Reset Password button on the user record. When you click the Reset Password button, the sign-in information is sent to the user by email, in two parts:

  - One email contains a temporary URL.
  - The second email contains a temporary password.

  In this case, the email does not include details of the user's sign-in ID.

About Deleting Users

You cannot delete users. When an employee leaves your company, change the status for that user to Inactive.

Before you begin. To set up users at your company, your role must include the Manage Users privilege.

To set up a user

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, do one of the following:
   - To add a new user, click New User.
   - To add several users quickly, click Quick Add.

     This opens the Quick Add page for you to enter required, limited information for each user. For example, it does not allow you to specify the reporting hierarchy.

     NOTE: You cannot use the Quick Add method if you have defined any other required User fields in addition to those on the Quick Add page.

     After entering information in the Quick Add window, click Save. This takes you to the User List page.
   - To edit a user's information, click the user's last name and, on the User Detail page, click the Edit button.
5. On the User Edit page, complete the information. For more information, see User Fields (on page 1365).
6. Save the record.

TIP: You can limit the user records you see by creating filtered lists. For instructions, see Working with Lists (on page 125).

To open a filtered list of users

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, select an option from the drop-down list.

User Fields

When setting up a user, the following fields require special care:

- Status
- Reports To or Reports To (Alias), depending on which of these fields is present on the user page layout
- Role

Entries for these fields determine what the user can access, view, and do.

This table describes some field information for users. To see all the fields listed in this table your role must include the Manage Users privilege. Some fields are read-only. Also, the fields you see might differ depending on whether you access the User Detail page by navigating from the User List page, or by drilling down on a user name in a record. These differences occur because different page layouts are used for these detail pages. For more information about user page layouts, see About User Page Layouts (on page 1376).

Field	Description
Key User Information section	
Status	The status indicates whether the user is active or inactive. For information on the sequence for setting up users' passwords and activating users, see Setting Up Users (on page 1363) and Resetting All Passwords (on page 1159). **NOTE:** Oracle CRM On Demand does not allow you to delete users. When an employee leaves your company, change the Status for that user to Inactive.
Reports To	The manager for the user. Each user must report to a manager for reporting and forecasting purposes. **NOTE:** Depending on the user page layouts that are set up for your company, the Reports To (Alias) field might appear instead of the Reports To field. The Reports To (Alias) field shows the short identifier for the manager of the user.
Partner Organization	The name of the partner organization that the user belongs to. This field is populated only for users who are members of a partner organization. **NOTE:** Users who are members of a partner organization and have the Manage Users within the Partner Organization privilege in their role can add other members of their partner organization as users in

Field	Description
	Oracle CRM On Demand. If your user role allows you to set up users who are part of your partner organization, this field is read-only.
Role	The role assigned to the user. To learn about roles, see Role Management (on page 1389).
Primary Group	The group that this user has been added to. Read-only.
Default Book	(Optional) The user book or custom book that the user sees by default in the Book selector when working in any area other than the Analytics pages. This setting on the user record does not limit the user's access to records. The user can select a different book in the Book selector. **NOTE:** You can specify a default book for each record type for a user. For more information, see Setting Up Default Books by Record Type for a User (on page 1377). If a default book is specified for a record type for the user, then in the Book selector, the default book for the record type takes precedence over the default book that is specified in the Default Book field on the user's profile.
Default Book for Analytics	(Optional) The user book or custom book that the user sees by default in the Book selector in the Analytics pages. This setting on the user record does not limit the user's access to data. The user can select a different book in the Book selector.
Preserve Default Book	This check box applies to the Book selector in all areas of Oracle CRM On Demand except the Analytics pages. The Preserve Default Book check box works as follows: - If this check box is selected, then the Book selector shows the book that is selected in the Default Book field in the user's profile each time that the user opens any page or window where the Book selector is available. The user can select a different book in the Book selector in any page or window. However, the next time that the user revisits that page or window, or opens any other page or window where the Book selector is available, the user sees the default book in the Book selector. The user's earlier selection in the Book selector is lost. - If this check box is not selected, then the Book selector shows the book that is selected in the Default Book field in the user's profile until the user selects a different book in the Book selector. After the user selects a different book in the Book selector, the user continues to see the new book in the Book selector for that record type until the user signs out and signs in again.
User Detail Information section	
Alias	A short identifier for the user, for example, the user's preferred name or nickname.

Field	Description
	If you add users through the Quick Add page, all the characters before the at sign (@) in the email address become the alias.
User ID	A unique system identifier for the user to sign in to Oracle CRM On Demand. The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters: - Asterisk (*) - Backslash (\) - Number sign (#) - Question mark (?) - Slash (/) - Tilde (~) Depending on the option that the company administrator selects in the Send Email on User Profile Update setting on the company profile, an email might be sent to the user when the value in the User ID field on the user's profile is changed. For more information about the Send Email on User Profile Update setting, see Setting Up Your Company Profile and Global Defaults (on page 1123).
Email	The complete email address for the user, such as isample@companysample.com. Users must have a valid email address to be granted access to Oracle CRM On Demand. The maximum number of characters that the email address can contain is 100. Depending on the option that the company administrator selects in the Send Email on User Profile Update setting on the company profile, an email might be sent to the user when the value in the Email field on the user's profile is changed. For more information about the Send Email on User Profile Update setting, see Setting Up Your Company Profile and Global Defaults (on page 1123).
Secondary Email	You can use this field to store an additional email address for a user. Oracle CRM On Demand does not send any notification or alert emails to this address.
User Sign In ID	Read-only field. This value is a combination of the company sign in ID and the user ID and is the unique system identifier for the user to sign in to Oracle CRM On Demand.
Contact Preferences	
Never Call	If this check box is selected, the user does not receive calls from Oracle CRM On Demand Marketing.

Field	Description
Never Mail	If this check box is selected, the user does not receive letters or brochures from Oracle CRM On Demand Marketing.
Never Email	If this check box is selected, the user does not receive emails from Oracle CRM On Demand Marketing.
Always Send Critical Alerts	If this check box is selected, the user receives emails containing important information from Oracle CRM On Demand. These messages include: - Critical information about product updates and service changes for Oracle CRM On Demand and related products - Instructions and schedules for upgrades to major new releases - High priority or emergency communications to supplement normal support processes (for example, in the case of a hardware failure) Only company administrators have the ability to update this check box for users. Primary contacts automatically have this check box enabled. **NOTE:** This check box is not used to determine which users receive the system alerts issued by Oracle CRM On Demand Customer Care, such as reminders for upcoming scheduled maintenance.
User Geographic Information section	
Language, Locale, Currency, Time Zone	If you do not set any values in these fields, the default values that were set up for the company are used. You can change the values for the user. Users can also override these settings when they edit their personal preferences.
User Security Information	

Field	Description
Reporting Subject Areas	This setting defines the user's visibility to records in real-time reports in Analytics. These reports provide real-time analyses of data. You can select one of the following values: - **Manager Visibility.** Allows the user to see data owned by the user and data owned by the user's subordinates. (This is the default setting.) - **Team Visibility.** Allows the user to see data owned by the user and data shared with the user through teams. If you do not define the Reporting Subject Areas setting, then the company-wide setting that is set up by your administrator applies. For more information on reports, see Analytics (on page 789), particularly the About Visibility to Records in Analytics (on page 807) topic. You can change the value for the user. Users can also override this setting when they edit their personal preferences.
Historical Subject Areas	This setting defines the user's visibility to records in historical reports in Analytics. The allowed values are as follows: - **Manager Visibility.** Allows the user to see data owned by the user and data owned by the user's subordinates. (This is the default setting.) - **Team Visibility.** Allows the user to see data owned by the user and data shared with the user through teams. - **Full Visibility.** Allows the user to see data owned by and shared with the user and data owned by and shared with the user's subordinates. If you do not define the Historical Subject Areas setting, then the company-wide setting that is set up by your administrator applies. You can change the value for the user. Users can also override this setting when they edit their personal preferences.
Role-Based Can Read All Records	Use this picklist to specify whether you want Analytics to use the Can Read All Records setting on a record-type basis, as defined on the Record Type Access page within the Role management wizard. If the Role-Based Can Read All Records setting is enabled through either the company profile or your user profile, and if the Can Read All Records visibility setting is selected by your administrator for your user role on a given record type, then you can view all records of that record type in Analytics. See About the Role-Based Can Read All Records Setting (see About the Role-Based Can Read All Records Setting on page 742) for guidance on when and how to enable the Role-Based Can Read all Records setting.

Field	Description
	If the Role-Based Can Read All Records setting is not enabled, then Analytics uses the visibility set on the Reporting Subject Areas and Historical Subject Areas fields.
External Unique ID	You can use this field to store an identifier for the user in an external system.

Integration ID	You can enter a value in this field, or you can allow the field to take a default value. Depending on how the user record is created, the Integration ID field takes a default value as follows:
	- For user records created through the user interface:
	  - If the Integration ID field is present in the Page Layout and no value is entered in the field, then the field takes the temporary Row ID allocated to the user record before the record was first saved.
	  - If the Integration ID field is not present in the user page layout, then the field takes the value of the Row ID field of the user record.
	- For user records created through any channel other than the user interface, if no value is entered in the Integration ID field, then the field takes the value of the Row ID field of the user record.
	
	You can change the value in the Integration ID field.

External Identifier for Single Sign On	If your company is set up to use Single Sign-On, the company administrator can use this field when mapping users in Oracle CRM On Demand to an external system, rather than using the User Sign In ID field. When users view their personal profile, this field is read-only. Depending on the option that the company administrator selects in the Send Email on User Profile Update setting on the company profile, an email might be sent to the user when the value in the External Identifier for Single Sign On field on the user's profile is

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td></td><td>changed. For more information about the Send Email on User Profile Update setting, see Setting Up Your Company Profile and Global Defaults (on page 1123).</td></tr>
<tr><td>Authentication Type</td><td>Determines how the user signs in to Oracle CRM On Demand.

If the authentication type at company level is anything other than User ID/PWD or Single Sign-On, this field is read-only on the user record. If the authentication type at company level is User ID/PWD or Single Sign-On, company administrators can select a value or leave this field blank on the user record as follows:

- User ID/Password Only. If this value is selected, the user must sign in using their Oracle CRM On Demand User Sign In ID and password.
- Single Sign-On Only. If this value is selected, the user must sign in using your company's single sign-on mechanism. When this value is selected, the user cannot sign in using an Oracle CRM On Demand User Sign In ID and password.
- User ID/PWD or Single Sign-On. If this value is selected, the user can sign in using either their User Sign In ID and password for Oracle CRM On Demand, or through your company's single sign-on method.
- Blank. If this field is blank on the user profile, then the company-level Authentication Type setting is used for the user.

When users view their personal profile, this field is read-only.

NOTE: If the User ID/PWD or Single Sign-On value is selected, then your company's policies for passwords in Oracle CRM On Demand continue to be enforced. So, when a user's password in Oracle CRM On Demand expires, Oracle CRM On Demand prompts the user to change the password, even if the user signs in using Single Sign-On. All other policies for passwords in Oracle CRM On Demand are also enforced, such as the minimum length of the password, the required complexity of the password, and so on. Oracle CRM On Demand does not manage the passwords that are used for Single Sign-On.

For more information about setting the authentication type at company level, see Setting Up Your Company Profile and Global Defaults (on page 1123).</td></tr>
<tr><td>Password State</td><td>Indicates the state of the user’s password (read-only). Possible values are:

- Active. The user’s password is valid.
- Disabled/Temporary. The user submitted a request for the password to be changed, or an administrator reset the password for the user, but the user has not yet saved a new password.
- Inactive. The Status field on the user record was previously set to Inactive, and the current credentials for the user cannot be used to sign in to Oracle CRM On Demand. If the Status field is changed to Active, then reset the user’s password to allow the user to sign in.</td></tr>
</table>

Field	Description
	- **Locked-Out.** The number of consecutive, failed attempts to sign in using the assigned password exceeded the number allowed by the Maximum Number of Current Password Attempts setting, and the lockout period specified in the Sign In Lockout Duration setting has not expired. - **Password Expired.** The user's password has expired. The length of time that user passwords are valid is determined by the Expire User Passwords In setting. - **Temporary Password Expired.** A temporary password was assigned to the user, but the user did not sign in with the temporary password within the time allowed by the Number Of Days Temporary Sign In Is Valid setting. You must reset the password again. - **Temporary Password Locked-Out.** The number of consecutive, failed attempts to sign in using a temporary password exceeded the number allowed by the Maximum Number of Current Password Attempts setting, and the lockout period specified in the Sign In Lockout Duration setting has not expired. **NOTE:** The settings referenced in the above descriptions are available on the Company Sign In and Password Control page. For more information about these settings, see Defining Your Company's Password Controls (on page 1152).
Additional Information section	
Default Theme	The theme that is used when the user signs in to Oracle CRM On Demand using a desktop or laptop computer. Users can override this setting when they edit their personal preferences. If a default theme is not selected in the user's record, then the default theme that is selected for the user's role is used. If a default theme is not selected in either the user's record or the user's role, then the default theme that is specified for the company is used. **NOTE:** Themes have no effect on how Oracle CRM On Demand behaves. If your user role has the appropriate privilege, you can create new themes according to company requirements. For more information about themes, see Creating New Themes (on page 1348).
Tablet Theme	(Optional) The theme that is used when the user signs in to Oracle CRM On Demand using a tablet computer or other touch-screen device, provided that the tablet computer or touch-screen device is detected by Oracle CRM On Demand. Users can override this setting when they edit their personal preferences. If a tablet theme is not selected in the user's record, then the tablet theme that is selected for the user's role is used. If a tablet theme is not selected in either the user's record or the user's role, then the tablet theme that is specified for the company is used. If a tablet theme is not specified at any level, then the default theme is used.

Field	Description
Default Search Record Type	The record type that appears in the search picklist in the Action bar when the user signs in to Oracle CRM On Demand.
Navigate Directly to Detail Page If Only One Record Is Returned	This picklist allows you to enable or disable the feature that opens a record returned by a search directly in the record Detail page, if it is the only record returned by the search. This setting is blank by default. The following options are available: - **Enabled.** If a search returns only one record, then the record opens directly in the record Detail page. - **Disabled.** The results of the search are always shown in a List page, even if the search returns only one record. Users can override this setting when they edit their personal profile. If the setting is blank in a user's profile, then the setting at company level is used, and if the setting is blank at company level as well, then the feature is disabled for the user. **NOTE:** This setting applies to searches that users perform directly in the Action bar, and to advanced searches of single record types that users perform from the Advanced link in the Action bar only. It does not apply to searches from the Advanced link in a list of related records, or to searches from the Advanced link in Lookup windows, or to searches of multiple record types.
Show Welcome Page on Sign In	To prevent the Welcome page from appearing each time the user signs in to Oracle CRM On Demand, deselect this check box. **NOTE:** Users can also deselect the Show Welcome Page on Sign In check box in the Welcome page when they sign in.
Fund Approval Limit	This field is for users of Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition. The amount that this user can approve for each fund request when setting the status to Claim Approved. If the user tries to exceed this limit, an error message appears, and Oracle CRM On Demand prevents the fund request approval.
Enable Message Center Animation	Determines whether the display of notes in the Message Center and record Details pages is animated.
Record Preview Mode	The user's record preview mode. Depending on the setting here, the preview window opens when the user hovers a pointer over a link to a record, or when the user clicks on a preview icon that appears when the pointer is hovered over a link to a record. The preview window shows the first section of the Detail page of the record. Selecting Off in this field disables the record preview functionality for the user. The record preview setting can be specified at company level and at user level. The setting at user level overrides the setting for the

Field	Description
	company. If this field is blank, the record preview setting for the company is used. Users can change this setting when they edit their personal preferences.
Head-up Display	If the head-up display functionality is turned on, and if the Support Head-up Display Settings check box is selected on the user's theme, then the user sees links for the related information sections on a detail page at the bottom of the browser window. The links allow the user to jump to a related information section without having to scroll down the page. The head-up display functionality can be turned on or off at the company level and at the user level. The setting at the user level overrides the setting for the company. If this field is blank, the head-up display setting for the company is used. Users can change this setting when they edit their personal preferences. If the Support Head-up Display Settings check box is not selected on the user's theme, then the head-up display is not available, even if the head-up display functionality is turned on at company level or at user level.
Related Information Format	Determines if the related information sections on record Detail pages are shown as lists or as tabs. If the Related Information Format field in the user's record is blank, then the setting for the user's role is used; and if the Related Information Format field on the user role is blank, then the setting for the company is used.
Freeze List Column Header	Determines whether the column headings in List pages always remain in view when the user scrolls down a page of records. This functionality can be turned on or off at company level and at user level. The setting at user level overrides the setting for the company. If this field is blank, then the setting for the company is used.
User Time Zone Support for Reporting Subject Areas	If this check box is present and selected on the user's profile, then the dates and times shown in real-time reports are displayed according to the user's time zone. If this check box is deselected on the user's profile, then the dates and times shown in reports are displayed according to the company's time zone. To enable this setting for users, the company administrator must add this field to the User Admin page layout for the administrator's role. To allow users to enable or disable this setting in their personal profile, the company administrator must add this field to the User Owner page layout for the relevant user roles.

Field	Description
Primary Division	The Primary Division field is not present on the User Detail page by default, but the company administrator can add it to the User Admin page layout. If your company uses the Division record type to organize your users into groupings to meet your business needs, then each user can be associated with one or more divisions. The first division that is associated with a user is automatically designated as the user's primary division, and the name of that division is shown in the Primary Division field on the user's record. Your company administrator can change the primary division on a user's record. For more information about divisions, see Division Setup (on page 1168). **NOTE:** A text field named Division is also available on the User record type. The Division text field on the User record type is not related to the Division record type.
Customized Code Enablement	This picklist field determines whether all customized code on the pages in Oracle CRM On Demand is enabled or disabled for the user, and whether the customized code indicator is enabled or disabled for the user. The following options are available: - **Enabled.** This is the default setting in the standard application. When this option is selected, all of the customized code that is available in the pages in Oracle CRM On Demand is enabled, but the customized code indicator is not enabled. - **Enabled with indicator.** When this option is selected, all of the customized code that is available in the pages in Oracle CRM On Demand is enabled. In addition, the customized code indicator is enabled. - **Disabled with indicator.** When this option is selected, all of the customized code that is available in the pages in Oracle CRM On Demand is disabled. In addition, the customized code indicator is enabled. **NOTE:** If you set this field to Disabled with indicator, then any reports and dashboards that are embedded in custom Web applets do not run for the user. For more information about customized code and the customized code indicator, see About Enabling and Disabling Customized Code and the Customized Code Indicator (on page 184). To change the setting in this field, the administrator must add this field to the User Admin page layout for the administrator's role. To allow users to change this setting in their personal profile, the administrator must add this field to the User Owner page layout for the relevant user roles.

NOTE: Users who have both the Manage Users and Access - Manage Delegated Users privilege and the Manage Users privilege (typically the company administrator) can appoint delegates for other users. Users who have the Manage Users and Access - Manage Delegated Users privilege can appoint delegates for themselves. For more information about appointing delegates, see About User Delegation (on page 1381), Adding Delegated Users (on page 748), and Managing Delegated Users (Administrator) (on page 1382).

About User Page Layouts

You can define a number of types of page layouts for user records. The page layout types correspond to different views of the user details in Oracle CRM On Demand. The following types of user page layouts are available from the User Application Customization page:

- **User Page Layout.** This type of page layout is used for the user detail pages that are displayed when you drill down on a user name from a record or from the Recently Viewed or Favorites lists. All users in the company can see these user detail pages. No related information sections are available for the page layouts of this type, but users can personalize the layout of the fields in the page, if their user role allows them to do so. For more information, see Changing Your Detail Page Layout (on page 749).
- **User Admin Page Layout.** This type of page layout is used for the user detail pages that are displayed from the User List page under User Management and Access Controls.
- **User Owner Page Layout.** This type of page layout is used for the Personal Detail page in My Setup. Users can control the layout of the fields and the related information sections in their Personal Detail page, if their user role allows them to do so. For more information, see Changing Your Detail Page Layout (on page 749).
- **Partner Admin Page Layout.** This type of page layout is used for the user detail pages that are displayed when partner users access user records from the Partner Self Administration link. To access the Partner Self Administration link, partner users must have the Manage Users within the Partner Organization privilege.

The separate user page layout types are useful when you have user fields that contain private data. In this situation, you do not want the private fields to be visible when a user drills down on a user name from a record. You can therefore make the private fields available in the page layouts of the User Owner layout type or the User Admin layout type, but you can make the private fields unavailable in the page layouts of the User layout type.

Page layouts are assigned to particular roles. Therefore, by assigning the appropriate page layouts to a role, you ensure that users with that role cannot see any private fields that they should not be able to see.

The following are examples of the type of field that can be useful to track as private fields for particular roles:

- Inside Sales Rep
  - Number of qualified leads that are not rejected
  - Number of leads contacted for each month
- Field Sales Rep
  - Cost of converting lead to customer
- Marketing Manager
  - Campaign effectiveness (the amount spent compared with the amount of revenue)
- Regional Sales Manager
  - Number of lost customers for each quarter
  - Volume of revenue stream lost to regional competitors

The separate user page layout types are also useful when you want to make fields read-only for some users. In this case, you make the fields available as read-only fields in the page layouts of the User Owner layout type for user roles that you do not want to be able to edit the fields.

CAUTION: Certain restrictions apply to adding the Reports To field and the Reports To (Alias) field to user page layouts. For more information, see About the Reports To and Reports To (Alias) Fields on User Records (on page 1377).

For more information about creating page layouts, see Customizing Static Page Layouts (on page 1267); for information about setting up roles, see Adding Roles (on page 1396).

About the Reports To and Reports To (Alias) Fields on User Records

The manager information on a user record is used in the reporting hierarchy and in forecasting. One of the following fields must be present on each page layout of the User Admin or Partner Admin layout type so that you can specify a manager for the user:

- **Reports To.** This field shows the full name of the user's manager.
- **Reports To (Alias).** This field shows the short identifier for the user's manager.

However, when you create your user page layouts, you must not add both of these fields to the same user page layout. If the Reports To field and the Reports To (Alias) field were both made available on a page layout, then any user whose role has that page layout assigned to it cannot use the inline edit feature in lists of user records or in user detail pages.

Similarly, do not add both the Reports To field and the Reports To (Alias) field to the same search layout for the user record type. If both of these fields are made available on a search layout, then any user whose role has that search layout assigned to it cannot search for user records; that is, the search fails.

Setting Up Users' Sales Quotas

If sales representatives use Oracle CRM On Demand to manage their forecasts, their quotas must be set up. Sales representatives can set up their own quotas or, as an administrator, you can create quotas for them. When selecting the year for a quota to start, you can select the current calendar year, or one of the preceding three years, or one of the upcoming three years.

This section describes the procedure for the administrator to set up a user's quotas.

To set up a user's quota

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user whose quota you want to set up.
5. On the User Detail page, scroll down to the Quotas section and do one of the following:
   - Click the New Quota button.
   - Click the Edit link for the quota you want to edit.
6. On the Edit Quota page, complete the fields.
   - To spread a yearly quota evenly over the fiscal year, enter the amount in the Total Quota field and click Spread.
   - To add the monthly quotas together, enter an amount for each month and click Sum.
7. Save the record.

Setting Up Default Books by Record Type for a User

You can specify a default book for each record type for a user. The user sees the specified book by default in the Book selector for the record type. However, specifying a default book does not limit the user’s access to records. The user can select a different book in the Book selector.

If you select a custom book as the default book for a record type, and if the record type is configured in book mode, then when the user creates a record of that record type, the Book field on the record is automatically populated with the name of the default book. If you select a user book or the All book as the default book for a record type, then when the user creates a record of that record type, the Book field on the record is not automatically populated with the name of the default book, even if the record type is configured in book mode. For more information about the book mode and other record ownership modes, see About Record Ownership Modes (on page 1428).

The following procedure describes how to set up default books by record type for a user.

To set up default books by record type for a user

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click User Management.
4. On the User List page, click the Last Name link for the user whose default books you want to set up.
5. On the User Detail page, scroll down to the Default Book by Record Type section, and do one of the following:
   a. Click New to add a default book for a record type.
   b. Click the Edit link for the default book that you want to change.
6. In the Add Default Book by Record Type page, select the record type and the book setting.
7. Save your changes.

Changing a User's User ID

You can change the user ID for a user.

The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters:

- Asterisk (*)
- Backslash (\)
- Number sign (#)
- Question mark (?)
- Slash (/)
- Tilde (~)

Before you begin. To perform this procedure, your role must include the Manage Users privilege. To allow users to change their email address or user ID, you must set up the Sign In and Password Control feature. For instructions, see Defining Your Company's Password Controls (on page 1152).

To change a user's User ID

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link of the user.
5. On the User Detail page, click Edit.
6. On the User Edit page, edit the User ID field.
7. Save the record.

Depending on the option that the company administrator selects in the Send Email on User Profile Update setting on the company profile, an email might be sent to the user when the value in the User ID field on the user's profile is changed. For more information about the Send Email on User Profile Update setting, see Setting Up Your Company Profile and Global Defaults (on page 1123).

The user can sign in to Oracle CRM On Demand by using the new user ID and the user's existing password.

Resetting a User's Password

In Oracle CRM On Demand, users must provide answers to a minimum of two security questions. These questions and answers can be used later if users forget their password. If users do not remember their security questions, or if they are locked out and want immediate access, you can reset their password.

NOTE: This procedure has the same effect as selecting the Email Temporary Password When I Click Save check box on the User Edit page. You must configure the user role and related information before emailing the temporary password.

Before you begin. To perform this procedure, your role must include the Manage Users privilege and the Manage Company - Reset All Passwords privilege. In addition, the role of the user whose password you want to change must include the Reset Personal Password privilege.

To reset a user's password

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user whose password you want to reset.
5. On the User Detail page, on the title bar, click the Reset Password button.

   The user's existing password is replaced with a new temporary password. The new temporary password is sent to the user by email.

   NOTE: This event is recorded in the Sign In History section on the User Detail page.

Resetting a User's DMS PIN

A personal identification number (PIN) is used to manage a user’s access to Oracle CRM On Demand Disconnected Mobile Sales. Resetting the PIN forces the user’s account in Oracle CRM On Demand Disconnected Mobile Sales to reauthenticate before accessing Oracle CRM On Demand data.

Oracle CRM On Demand Disconnected Mobile Sales is an independent product. Oracle CRM On Demand users are not automatically licensed to use Oracle CRM On Demand Disconnected Mobile Sales. If Oracle CRM On Demand Disconnected Mobile Sales is provisioned for a user, then Oracle CRM On Demand automatically manages the user’s access to Oracle CRM On Demand Disconnected Mobile Sales. For example, the user’s password and account status remain synchronized across both systems, with a short delay. To force synchronization, you need to explicitly reset a user's PIN. For example, you might force synchronization immediately after you disable a user's account in Oracle CRM On Demand, to ensure that the user's account in Oracle CRM On Demand Disconnected Mobile Sales is disabled at the same time.

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

To reset a user's DMS PIN

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user whose PIN you want to reset.
5. On the User Detail page, on the title bar, click Reset DMS PIN.

Changing the Primary Division for a User

If your company uses the Divisions record type, then users can be associated with divisions. For more information about divisions and about associating users with divisions, see Division Setup (on page 1168) and Associating Users with Divisions (on page 1171).

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

To change the primary division for a user

1. Click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the User and Group Management section, click the User Management link.
4. In the User List, click the last name of the user whose primary division you want to change.
5. On the User Detail page, in the Primary Division field, click the Lookup icon and select the division that you want to be the primary division for the user.

Reviewing Sign-In Activity for a User

You can review the sign-in history for each user at your company.

NOTE: Every night, Oracle CRM On Demand permanently deletes user sign-in records that are more than 90 days old. The user adoption history data is stored in the data warehouse to support the historical trend analysis of user adoption metrics in Oracle CRM On Demand analytics, but the data is not retained when a full extract, transform, and load (ETL) of data is performed during an upgrade of Oracle CRM On Demand to a new release, or when company data is migrated from one Oracle CRM On Demand environment to another Oracle CRM On Demand environment. For information about the Usage Tracking Analysis analytic subject area, see Usage Tracking Analysis Historical Analytics Subject Area (on page 895).

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

To review sign-in activity for a user

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user whose sign-in activity you want to view.
5. To review the user's sign-in activity, scroll down to the Sign-in History section.

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

Reviewing Security-Related Activities for Users

You can review details of security-related activities in the Audit section of the user record.

About the Audit and Audit Trail Sections on User Records

Audit information is displayed in two related information sections on the user record, as follows:

- **Audit section.** The Audit section shows information about security-related activities, such as when the user's password was set initially and when the password was reset.
- **Audit Trail section.** The Audit Trail section on the user record shows the changes to certain fields on the user record. A number of fields are audited by default, but company administrators can specify that additional fields are to be audited. Company administrators can also view audit trail information for users in the Master Audit Trail. For information about customizing audit trails for record types, see Customizing the Audit Trail (on page 1306). For information about viewing audit trails for individual records, see Viewing Audit Trails for Records (on page 175). For information about viewing audit trail information in the Master Audit Trail, see Reviewing Audit Trail Changes with the Master Audit Trail (on page 1176).

Before you begin. To perform the following procedure, your role must include the Manage Users privilege.

To review security-related activities for a user

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the User Management link.
4. On the User List page, click the Last Name link for the user that you want to view.
5. Scroll down to the Audit section to review details of the security-related activities on the user record.

About User Delegation

When the delegated users feature is enabled, users can delegate owner access of their records to other users. In addition, users who have the appropriate privileges can appoint delegates for other users. Typically, only company administrators can appoint delegates for other users.

The delegated users feature is controlled using the following check boxes on the Company Profile page:

- Manager Visibility Enabled
- Display Book Selector

For the delegated users feature to work, both of these check boxes must be selected. In addition, the Delegated To Users and the Delegated From Users related information sections must be available on the relevant page layouts for the user's or administrator's role, as follows:

- To allow a user to appoint delegates, the Delegated To Users related information section must be available on the User Owner page layout for the user's role.
- To allow a user to see a list of the users for whom the user is a delegate, the Delegated From Users related information section must be available on the User Owner page layout for the user's role.
- To allow administrators to appoint delegates for other users, at least one of the following related information sections must be available on the User Admin page layout for the administrator’s role:
  - **Delegated To Users.** In the Delegated To Users section of a user's record, the administrator can appoint delegates for the user.
  - **Delegated From Users.** In the Delegated From Users section of a user's record, the administrator can appoint the user as a delegate for other users.

To appoint delegates for other users, your role must include the following privileges:

- Manage Users
- Manage Users and Access - Manage Delegated Users

To appoint delegates for themselves, users must have the Manage Users and Access - Manage Delegated Users privilege in their role.

When appointing delegated users, note the following information:

- The Delegated User Role field is not related to the user role or to data access in any way. It is a picklist that a company administrator can define to categorize the user delegates. This picklist does not have any default values. The company administrator can customize it, as necessary, from the Delegated Users Field setup page. For more information about customizing picklists, see Changing Picklist Values (on page 1254).
- Delegated users gain the primary user's owner access to the records that the primary user owns or has access to through teams or groups. Delegated users do not gain the primary user's default access to records.
- For any record type, the delegated user must have the Has Access option enabled in his or her user role to be able to see records of that type using delegated access. Similarly, the delegated user must have the Can Create option for a record type enabled in his or her user role to be able to create records of that type.
- Delegated users can use the Include sub-items option in the Book selector to see all of their own records and those of the primary user in lists. Alternatively, they can select their own name to see only the records they have access to through ownership, role, team, and so on. Or, they can select the name of the primary user to see only the records that the primary user owns or can access through a team or a group.
- The delegated user's level of access to data (that is, Manager Visibility, Team Visibility, or Full Visibility) for reporting subject areas and historical subject areas continues to apply, even when the delegated user is looking at data delegated by a primary user.

Managing Delegated Users (Administrator)

As a company administrator, you can appoint users as delegates for other users. For more information about how user delegation works, see About User Delegation (on page 1381).

NOTE: Users can also appoint delegates for themselves through their Personal Detail page. For more information on how users can appoint delegates, see Adding Delegated Users (on page 748).

To perform the procedures described in this topic, your role must include the following privileges:

- Manage Users
- Manage Users and Access - Manage Delegated Users

In addition, at least one of the following related information sections must be available on the User Admin page layout for your role:

- **Delegated To Users.** In the Delegated To Users section of a user's record, you can appoint one or more delegates for the user.
- **Delegated From Users.** In the Delegated From Users section of a user's record, you can appoint the user as a delegate for one or more users.

If the Delegated To Users and the Delegated From Users related information sections are not visible in the User Detail page where you want to appoint a delegate, you can make the sections available as follows:

- In the User Detail page, click Edit Layout in the upper-right corner of the page, and add the sections to your page layout.
- If the related information section that you want is not available to add to your page layout, you can customize the User Admin page layout for your role. For more information about customizing page layouts, see Customizing Static Page Layouts (on page 1267).

To appoint one or more delegates for a user, complete the steps in the following procedure.

To appoint one or more delegates for a user

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. On the User Management and Access Controls page, click User Management.
4. On the User List page, click the Last Name link for the user for whom you want to add delegates.

5 On the User Detail page, scroll down to the Delegated To Users section, and click Add in the title bar of that section.
6 On the Delegated Users Edit page, click the Lookup icon.
7 In the Lookup window, select the users whom you want to appoint as delegates.
8 If values are defined in the Delegated User Roles field, then you can optionally select a delegated user role for each user.
9 Save your changes.

NOTE: In the Delegated To Users section of the User Detail page, the Role field shows the role of the delegate in Oracle CRM On Demand. The Delegated User Role field shows the delegated user role for the delegate, if one is defined.

To remove a delegate from the list of delegates for a user, complete the steps in the following procedure.

To remove a delegate from the list of delegates for a user

1 In the upper-right corner of any page, click the Admin global link.
2 In the User Management and Access Controls section, click User Management and Access Controls.
3 On the User Management and Access Controls page, click User Management.
4 On the User List page, click the Last Name link for the user whose list of delegates you want to update.
5 On the User Detail page, scroll down to the Delegated To Users section.
6 In the record-level menu, select Remove for the user whom you want to remove from the list of delegates.
7 Click OK to confirm the change.

To appoint a user as a delegate for one or more users, complete the steps in the following procedure.

To appoint a user as a delegate for one or more users

1 In the upper-right corner of any page, click the Admin global link.
2 In the User Management and Access Controls section, click User Management and Access Controls.
3 On the User Management and Access Controls page, click User Management.
4 On the User List page, click the Last Name link for the user that you want to appoint as a delegate for one or more users.
5 On the User Detail page, scroll down to the Delegated From Users section, and click Add in the title bar of that section.
6 On the Delegated Users Edit page, click the Lookup icon.
7 In the Lookup window, select the users for whom you want to appoint the current user as a delegate.
8 Save your changes.

In certain circumstances, such as when a user moves to a different section within your company, you might want to revoke a user's permission to act as a delegate for one or more users. To revoke a user's permission to act as a delegate for one or more users, complete the steps in the following procedure.

To revoke a user's permission to act as a delegate for one or more users

1 In the upper-right corner of any page, click the Admin global link.
2 In the User Management and Access Controls section, click User Management and Access Controls.
3 On the User Management and Access Controls page, click User Management.
4 On the User List page, click Last Name for the user whose permission to act as a delegate you want to revoke.

5 On the User Detail page, scroll down to the Delegated From Users section.

6 For each user for whom you no longer want the current user to act as a delegate, select Remove from the record-level menu, and then click OK to confirm the change.

Creating Inventory Periods for Users

This topic is specific to Oracle CRM On Demand Life Sciences Edition. You must create an inventory period for each sales representative who uses Oracle CRM On Demand Life Sciences Edition. You must do this only once for each sales representative. You can create inventory periods manually, or using the import function in Oracle CRM On Demand.

NOTE: Typically, inventory periods are populated through the import function when Oracle CRM On Demand is first set up for a company.

After you create the initial inventory period for a sales representative, each time an inventory period is closed for the sales representative, a new inventory period is automatically created.

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

To create an inventory period for a user

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

2 In the User Management and Access Controls section, click the User Management and Access Controls link.

3 On the User Management and Access Controls page, click the User Management link.

4 On the User List page, click the Last Name link of the user.

5 On the User Detail page, click New Inventory Period.

The start date for the inventory period defaults to the current date.

NOTE: Oracle CRM On Demand does not display a message to confirm that the inventory period has been created for the user, and the User Detail page remains open. If you want to verify that the inventory period has been created, click the Inventory Period tab, and view the list of recently modified inventory periods.

Deactivating Users

You cannot delete a user. Instead, you need to make the user inactive. You do not need licenses for inactive users.

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

To deactivate a user

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

2 In the User Management and Access Controls section, click the User Management and Access Controls link.

3 On the User Management and Access Controls page, click the User Management link.

4 On the User List page, click the Last Name link for the user you want to remove from the system.

5 On the User Detail page, click the Edit button.

6 On the User Edit page, in the Key User Information section, select Inactive in the Status field.

7 Save the record.

Partner Self Administration

Company administrators can set up one or more users in a partner organization as partner administrators in Oracle CRM On Demand. Partner administrators can perform a limited set of user management task, such as setting up members of their organization as users in Oracle CRM On Demand, editing those user records, and resetting passwords or changing user IDs for those users. Partner administrators manage their users in the partner self-administration pages in Oracle CRM On Demand.

Access to the partner self-administration pages is controlled by the Manage Users within the Partner Organization privilege.

NOTE: Company administrators grant the Manage Users within the Partner Organization privilege to members of partner organizations. This privilege is not given to users in the brand owner company.

For information about setting up partner administrators, see Process of Setting Up Partner Administrators (Administrator) (on page 1385). For information about managing users in the partner self-administration pages, see Managing Users in Your Partner Organization (Partners) (on page 1386).

Process of Setting Up Partner Administrators (Administrator)

The privilege that controls access to the partner self-administration pages is the Manage Users within the Partner Organization. This privilege allows partner administrators to work with user records for members of their own partner organization only. Partner administrators do not require and must not be granted the Manage Users privilege, because that privilege allows the partner administrator to see and edit user records for users outside his or her partner organization.

For security reasons, company administrators also determine which roles partner administrators can give to users in their partner organization. To do this, you associate roles with the partner organization record. Then, when a partner administrator sets up a user, only the roles that you have associated with the partner organization are available to be given to the user. Limiting the roles that partner administrators can grant to users enables you to ensure that partner administrators cannot give their users inappropriate privileges or access to data that the users are not supposed to see.

NOTE: Associating roles with a partner record limits the choice of roles that partner administrators can give to their users. It does not limit the choice of roles that company administrators in the brand owner company can assign to the users in the partner organization.

To set up a partner administrator, perform the following tasks:

1. In the partner administrator's user role, grant the Manage Users within the Partner Organization privilege.

   For information about granting privileges to roles, see Adding Roles (on page 1396).

   NOTE: You can create a new role for partner administrators, or you can edit an appropriate existing role. You can also create different roles for partner administrators in the various partner organizations.

2. (Optional) Create a customized Partner Admin page layout for User record type, and assign it to the user's role.

   For information about creating customized page layouts, see Customizing Static Page Layouts (on page 1267). For information about assigning page layouts to roles, see Adding Roles (on page 1396).

3. (Optional) If you want to create specific roles for users in the partner organization, set up the roles.

   For information about setting up roles, see Role Management (on page 1389) and Adding Roles (on page 1396).

4. In the Partner Roles related information section on the partner organization record, add the roles that the partner administrator can grant to the users in the partner organization.

   For more information about linking records, see Linking Records to Your Selected Record (on page 117).

5. If the role that you created or edited for the partner administrator is not already assigned to the user who is to act as the partner administrator, assign the role to the user.

   For more information about assigning roles to users, see Setting Up Users (on page 1363).

Managing Users in Your Partner Organization (Partners)

Before you begin. To manage users in your partner organization, you must have the Manage Users within the Partner Organization privilege in your role.

You manage users in your organization in the partner self-administration pages in Oracle CRM On Demand. You access the partner self-administration pages from the global Admin link, which is available on every page in Oracle CRM On Demand.

To manage users in your partner organization, do the following:

- Setting Up Users (Partners) (on page 1386)
- Changing a User's User ID (Partners) (on page 1388)
- Resetting a User's Password (Partners) (on page 1388)
- Deactivating Users (Partners) (on page 1389)

NOTE: Your Oracle CRM On Demand administrator might set up the audit trail for changes that are made to user records through the partner self-administration pages. If the audit trail is set up, then you can view the details of the changes that are made to the audited fields in the Audit Trail related information section in the User Detail page.

Related Topics

See the following topics for related information about user management:

- User Fields (on page 1365)
- Viewing Audit Trails for Records (on page 175)

Setting Up Users (Partners)

Before you begin. To perform this procedure, you must have the Manage Users within the Partner Organization privilege in your role.

When setting up a user, the following fields determine what the user can access, view, and do. You must use them correctly.

- **Status field.** When you first set up a user, you can allow the user to access Oracle CRM On Demand immediately by setting the user's status to Active and prompting Oracle CRM On Demand to send the necessary sign-in information to the user when you save the user record.

  Alternatively, if you do not want the user to access Oracle CRM On Demand until later, you can set up the user record and set the user's status to Inactive. When you later want to allow the user to access Oracle CRM On Demand, you change the status of the user to Active, and use the reset password functionality to send the necessary sign-in information to the user by email.
- **Reports To field or Reports To (Alias) field.** The reporting structure determines whose records the managers can access. It also determines whose data is included in calculations for forecasting as well as in the reports for managers and executives. The page where you set up users can contain either the Reports To field or the Reports To (Alias) field but must not contain both of these fields. For more information about the Reports To and Reports To (Alias) fields, see About the Reports To and Reports To (Alias) Fields on User Records (on page 1377).

  TIP: Enter users who are at the top of the reporting hierarchy first.
- **Role field.** The user's role determines the user's access to tabs, features, records, and page layouts.

  NOTE: The company administrator determines which roles you can assign to users in your partner organization.

When you create a user in your partner organization, the Partner Organization field on the user record is automatically populated with the name of your partner organization, and you cannot change it.

About Sign-In Information for New Users

To sign in to Oracle CRM On Demand, a new user must have a temporary URL for Oracle CRM On Demand and a temporary password. You can prompt Oracle CRM On Demand to send the sign-in information to the user at the time that you create the user account, or you can do it later, as follows:

- If you want to send the sign-in information at the time that you set up the user account, select the Email Password When I Click Save check box on the user record before you save the user record for the first time.

  You must select the check box before you save the record for the first time if you want the information to be sent to the user immediately. The sign-in information is sent to the user by email, in two parts:

  - The first email contains a temporary URL.
  - The second email contains a temporary password and details of the user's sign-in ID.
- If you want to send the sign-in information to the user later, do not select the Email Temporary Password When I Click Save check box when you create the user record.

  Later, when you want to send the sign-in information to the user, you can prompt Oracle CRM On Demand to send the information by clicking the Reset Password button on the user record. When you click the Reset Password button, the sign-in information is sent to the user by email, in two parts:

  - The first email contains a temporary URL.
  - The second email contains a temporary password.

  In this case, the email does not include details of the user's sign-in ID.

About Deleting Users

You cannot delete users. When an employee leaves your company, change the status of that user to Inactive.

The following procedure describes how to set up a member of your organization as a user in Oracle CRM On Demand.

To set up a user

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click Partner Self Administration.

   The User List page opens, showing a list of the users in your partner organization.
3. On the User List page, do one of the following:
   - To add a new user, click New User.
   - To edit a user's information, click the user's last name and, on the User Detail page, click the Edit button.
4. On the User Edit page, complete the information.

   For more information, see User Fields (on page 1365).
5. Save the record.

TIP: You can limit the user records that you see by creating filtered lists. For information on filtered lists, see Working with Lists (on page 125).

Any list of user records that you open shows only the users who meet the criteria in the list filter and who are members of your partner organization. The following procedure describes how to open a filtered list of users.

To open a filtered list of users

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click Partner Self Administration.

   The User List page opens, showing a list of the users in your partner organization.
3. On the User List page, select an option from the drop-down list.

Changing a User's User ID (Partners)

The following procedure describes how to change the user ID for a user in your partner organization.

The maximum number of characters that a user ID can contain is 50. A user ID cannot contain spaces or any of the following special characters:

- Asterisk (*)
- Backslash (\)
- Number sign (#)
- Question mark (?)
- Slash (/)
- Tilde (~)

Before you begin. To perform this procedure, you must have the Manage Users within the Partner Organization privilege in your role.

To change a user's user ID

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click Partner Self Administration.

   The User List page opens, showing a list of the users in your partner organization.
3. On the User List page, click the Last Name link of the user.
4. On the User Detail page, click Edit.
5. On the User Edit page, edit the User ID field.
6. Save the record.

Depending on the option that the company administrator selects in the Send Email on User Profile Update setting on the company profile, an email might be sent to the user when the value in the User ID field on the user's profile is changed. For more information about the Send Email on User Profile Update setting, see Setting Up Your Company Profile and Global Defaults (on page 1123).

The user can sign in to Oracle CRM On Demand by using the new user ID and the user's existing password.

Resetting a User's Password (Partners)

In Oracle CRM On Demand, users must answer a minimum of two security questions. These questions and answers can be used later if users forget their password. If users do not remember their security questions, or if they are locked out and want immediate access, you can reset their password.

Before you begin. To perform this procedure, your role must include the Manage Users within the Partner Organization privilege and the Manage Company - Reset All Passwords privilege. In addition, the role of the user whose password you want to change must include the Reset Personal Password privilege.

NOTE: This procedure has the same effect as selecting the Email Temporary Password When I Click Save check box on the User Edit page. You must configure the user role and related information before sending an email with the temporary password.

The following procedure describes how to reset the password for a user in your partner organization.

To reset a user's password

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click Partner Self Administration.

   The User List page opens, showing a list of the users in your partner organization.

3 On the User List page, click the Last Name link for the user whose password you want to reset.
4 On the User Detail page, on the title bar, click the Reset Password button.

   The user's existing password is replaced with a new temporary password. The new temporary password is sent to the user by email.

   NOTE: This event is recorded in the Sign In History section on the User Detail page.

Deactivating Users (Partners)

You cannot delete a user. Instead, you must make the user inactive. Inactive users do not require a license. The following procedure describes how to deactivate a user in your partner organization.

Before you begin. To perform this procedure, you must have the Manage Users within the Partner Organization privilege in your role.

To deactivate a user

1 In the upper-right corner of any page, click the Admin global link.
2 In the User Management and Access Controls section, click Partner Self Administration.

   The User List page opens, showing a list of the users in your partner organization.
3 On the User List page, click the Last Name link for the user you want to remove from the system.
4 On the User Detail page, click the Edit button.
5 On the User Edit page, in the Key User Information section, select Inactive in the Status field.
6 Save the record.

Role Management

In Oracle CRM On Demand, you manage roles in the Role List page and in the Role Management Wizard. You access the Role List page and the Role Management Wizard from the global Admin link, which is available on every page in Oracle CRM On Demand.

A *role* in Oracle CRM On Demand is similar to a business function that a user performs within an 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 defining the features in Oracle CRM On Demand that a user has the privileges to use, the set of permissions the user is given to work with protected information, and the user interface settings that display information.

NOTE: Users can be employees or employees of a partner organization. Users can also be external systems that access Oracle CRM On Demand.

The parameters defined by a role include:

- Privileges
- Access to record types
- Access profiles for the role
- User interface settings, which include the following:
  - Tab settings
  - Page layouts
  - Search layouts
  - Homepage layouts

Each user has one assigned role. The same role can be assigned to multiple users. Roles do not have a hierarchy.

Related Topics

See the following topics for related information:

- Guidelines for Setting Up Roles (on page 1390)
- Working with the Role List Page (on page 1391)
- About Record Type Access in Roles (on page 1392)
- About Access Profiles in Roles (on page 1405)
- About Privileges in Roles (on page 1394)
- About IP Address Restrictions for Roles (on page 1394)
- Adding Roles (on page 1396)

Guidelines for Setting Up Roles

Oracle CRM On Demand provides a set of prebuilt roles that you can use as your starting point for setting up roles for your company. The User and Role Setup Template contains information about the prebuilt roles, listing their record access, privileges, and default tab access. For information about finding the User and Role Setup templates, see Using Administrator Templates During Setup (on page 1121).

As an example of the type of role that you can set up in Oracle CRM On Demand, your company might require two distinct sales forces: the Install Base Account Management sales force and the New Business sales force. Field sales representatives in the Install Base Account Management sales force track account information about their customer deployments. Field sales representatives in the New Business sales force track account information that profiles the purchasing requirements of their prospect account. Although these two job duties are similar, the type of information most relevant to support their daily processes is different. In this example, you can set up two roles:

- The Install Base Field Sales Reps role
- The New Business Field Sales Reps role

You can base each of these roles on the prebuilt Field Sales Rep role, and tailor the new roles by adding different page layouts to support the unique business requirements of the two sales forces.

You can continue to change and add role definitions as required, for example, as a result of organizational change, or the acquisition of another company. If the organizational structure of your company changes, the business functions of one or more employees can also change. If your company acquires another company, you might have to assimilate additional employees as users in Oracle CRM On Demand.

When setting up roles, follow these guidelines:

- Determine how each employee or group of employees will use Oracle CRM On Demand.

  Examine the job functions of your employees to determine the following:

  - What tasks they must complete and which records they require access to
  - What kind of access they require to each type of record
  - If there are records or tabs that they must not be able to access

  The following table shows some examples of access types.

Access Type	Example
Feature access	The Inside Sales Rep role provides access to the Convert button on the Lead Detail page.
Record access	The Executive role provides edit access to all opportunity records regardless of the owner.

Access Type	Example
Tab access	By default, users who have the Sales and Marketing Manager role can access the Accounts and Opportunities tabs, but cannot access the Service Requests and Solutions tabs.

- Review the characteristics of each of the prebuilt roles to determine if these roles meet the needs of your employees.

  The names of the prebuilt roles do not necessarily match your company's job titles. You must match job functions and tasks to the roles, not job titles.
- Set up your roles as follows:
  - If a prebuilt role is close to what you want for an employee group, create a new role by copying the prebuilt role, giving the copy a new name, and then editing the copy to meet your requirements.
  - If no prebuilt role is close to what you require, create a new role to match your requirements.

  TIP: Use the User and Role Setup Template to help you document the role requirements of your employee groups. Then, refer to the completed template when you create or edit roles and set up users in Oracle CRM On Demand.

Related Topics

See the following topics for related information:

- Role Management (on page 1389)
- Working with the Role List Page (on page 1391)
- About Record Type Access in Roles (on page 1392)
- About Access Profiles in Roles (on page 1405)
- About Privileges in Roles (on page 1394)
- Adding Roles (on page 1396)

Working with the Role List Page

On the Role List page, you can perform the actions in the following table.

To do this	Follow these steps
Add a new role	In the title bar of the Role List page, click New Role. The Role Management Wizard opens. For more information about using the Role Management Wizard, see Adding Roles (on page 1396).
Add a new role by copying an existing role	In the record-level menu beside the role name, select Copy. The Role Management Wizard opens. For more information about using the Role Management Wizard, see Adding Roles (on page 1396).
Delete a role	In the record-level menu beside the role name, select Delete, then confirm that you want to delete the role. **NOTE:** You cannot delete the Administrator role. When you delete a role, all users who have that role assigned to them continue to have the role until you assign a different role to

To do this	Follow these steps
	them. However, after you delete a role, you cannot assign that role to any user.
Select a language for viewing the list of roles	In the title bar of the Role List page, in the Translation Language field, select the language in which you want to view the list of roles. You can view the list in any of the languages that are supported for your company in Oracle CRM On Demand. **NOTE:** If an existing role does not have a translated role name, the name of the role is not translated and appears in brackets.

If the Alpha Search controls are available, then you can use Alpha Search to filter the list of roles. For more information about Alpha Search, see Filtering Lists (on page 136).

The following table describes some of the fields that are displayed on the Role List page. The fields described in the table are read-only on the Role List page, and you cannot use them to sort or filter the list of roles.

Field	Description
Overridden Company Password Policy	This check box is selected if the Expire User Passwords In field on the role is populated. If the Expire User Passwords In field is populated, then for the users who have this role, the password expiry period for the role overrides the password expiry period for the company.
Additional IP Restrictions	This check box is selected if IP restrictions are defined on the role.

Related Topics

See the following topics for related information:

- Role Management (on page 1389)
- Guidelines for Setting Up Roles (on page 1390)
- About Record Type Access in Roles (on page 1392)
- About Access Profiles in Roles (on page 1405)
- About Privileges in Roles (on page 1394)
- About IP Address Restrictions for Roles (on page 1394)
- Adding Roles (on page 1396)

About Record Type Access in Roles

You control access to primary record types for a role in step 2 of the Role Management Wizard. For more information about adding roles, see Adding Roles (on page 1396).

A primary record type is a record type that can be used as an independent record type. Most, but not all, of the primary record types can appear as tabs in Oracle CRM On Demand. However, there are some primary record types that cannot appear as tabs. For example, the Book record type is a primary record type (that is, book records can be created as independent records). However, the Book record type cannot appear as a tab. Record types that are not primary record types cannot appear as tabs.

With some exceptions, the primary record types that meet the following criteria are listed in step 2 of the Role Management Wizard:

- Your company is licensed to use the record type.
- Your role has the appropriate privilege to access the record type.

The exceptions are record types that are used for administrative purposes only, such as the company profile, user records, workflow rules, and so on. Access to such record types is controlled through privileges only.

For each primary record type that is listed in step 2 of the wizard, access to the record type for the role is controlled through three settings:

- **Has Access.** When the Has Access check box in step 2 of the Role Management Wizard is selected for a primary record type on a role, users who have the role can access records of that record type. If the Has Access check box is deselected for a record type on a role, users who have the role are denied all forms of access to the record type. For example, if the Has Access check box is deselected for the Account record type on a role, all forms of access to the Account record type, including related applets, search capabilities, and other access to the Account record type, are denied to users who have the role. Then the following can occur:
  - If a user who does not have access to the Account record type attempts to associate an opportunity with an account record, the operation fails.
  - If a user who does not have access to the Account record type sees an opportunity that is already linked to an account, the user is not able to view any details of the linked account record.

  NOTE: Denying access to a record type (by not selecting the Has Access check box for the record type in the Role Management Wizard) can prevent a user from being able to create a record of another record type. For example, if you deny access to a record type that a user must access to create a record based on another record type, you can prevent a user who has the role from being able to create that record.

- **Can Create.** When the Can Create check box in step 2 of the Role Management Wizard is selected for a record type on a role, users who have the role can create records of that record type.

  If the Can Create check box for a primary record type is deselected, users who have the role do not have the ability to create a record of that primary record type.

  NOTE: The permission to create records of a primary record type is controlled by this setting. It is not controlled through access profiles. Access profiles control access to existing data, so primary records must exist before access profiles can control access to those records.

- **Can Read All Records.** When the Can Read All Records check box in step 2 of the Role Management Wizard is selected for a primary record type on a role, users who have the role can see all records of that record type. If the Can Read All Records check box is deselected for a primary record type, as a general rule, users who have the role can see records of that record type only if they are authorized to see the record. Other access-control components can influence the visibility to records, such as books, teams, groups, and the management hierarchy. Users can gain visibility to records that they do not own through those access-control components. However, if no other access-control component authorizes visibility to the records, and the Can Read All Records check box is deselected, then the user sees only the records that the user owns.

Related Topics

See the following topics for related information:

- Role Management (on page 1389)
- Guidelines for Setting Up Roles (on page 1390)
- Working with the Role List Page (on page 1391)
- About Access Profiles in Roles (on page 1405)
- About Privileges in Roles (on page 1394)
- Adding Roles (on page 1396)

About Privileges in Roles

You grant or revoke privileges for a role in step 4 of the Role Management Wizard. For more information about adding roles, see Adding Roles (on page 1396).

Privileges control the features that your company is licensed to use in Oracle CRM On Demand. When your company is first set up to use Oracle CRM On Demand, the Administrator role is given all the privileges for all the licensed features. Every time a user interacts with Oracle CRM On Demand, Oracle CRM On Demand reviews the set of privileges assigned to that user's role to determine whether the user has the necessary privileges to perform certain functions and to access certain record types. If a privilege that was previously granted to a role is later revoked, any user who has the role loses the ability to use the feature. When a privilege is revoked, any existing data and configuration information that were put in place by a user who had the privilege are not lost.

In the Role Management Wizard, privileges are organized in categories. Each category represents the group of privileges that comprises a piece of functionality in Oracle CRM On Demand. For example, *Admin: Users and Access Controls* is a category of privilege that controls all functional areas of User Management and Access Control.

Each privilege relates to an individual functional area within a category of privileges. For example, Manage Books is a privilege that is required if a user who has the role wants to create, update, edit, and delete custom books and subbooks, and manage associated members. Each privilege also exposes control fields and other capabilities unique to the feature. To determine which privileges are required to allow users to use a feature, see the online help.

NOTE: Granting a privilege to a role is not enough to grant all access rights to allow a user to use the functionality. When you grant a privilege, the necessary record types and functional details required for the feature are exposed in the role. For example, when the Manage Books privilege is assigned to a role, a user who has the role sees the Books record type in step 2 of the Role Management Wizard, and also in the Access Profile Wizard. However, to give the user the necessary rights to work with book records, you must also configure the necessary levels of access in step 2 (Record Type Access) of the Role Management Wizard for the user's role and in the access profiles for the role.

Related Topics

See the following topics for related information:

- Role Management (on page 1389)
- Guidelines for Setting Up Roles (on page 1390)
- Working with the Role List Page (on page 1391)
- About Record Type Access in Roles (on page 1392)
- About Access Profiles in Roles (on page 1405)
- Adding Roles (on page 1396)

About IP Address Restrictions for Roles

You can specify IP address restrictions at role level. This functionality enables you to restrict access to Oracle CRM On Demand so that users who have a certain role can sign in to Oracle CRM On Demand only from computers that have IP addresses within the ranges that are specified for that role. You can also specify IP address restrictions at company level, for more information, see Restricting Use to IP Addresses (on page 1160). A user is allowed to sign in only if the IP address of the user’s computer is within the ranges specified at role level and at company level.

To allow you to restrict access to Oracle CRM On Demand to specific ranges of IP addresses at company level, role level, or both levels, the IP Address Restrictions Enabled check box on the company profile must be selected. If this check box is not already selected, then contact Oracle CRM On Demand Customer Care and ask them to select the check box.

You can restrict access to specific ranges of IP addresses at role level even if you do not restrict access to specific ranges of IP addresses at company level. However, if you restrict access to specific ranges of IP addresses at both company level and role level, then the ranges of IP addresses that you allow for a user role must fall within the ranges of the IP addresses that you allow at company level. If you restrict access for a user role, then users who have that role can sign in to Oracle CRM On Demand only if the IP addresses of their computers are within the ranges of IP addresses that are allowed for the user role and are also within the ranges of IP addresses that are allowed at company level.

The following table shows an example of how the IP address restrictions at company level work with the IP address restrictions at role level. In all cases shown in this table, the IP Address Restrictions Enabled check box on the company profile is selected, and no IP address restrictions are specified in any role other than the Field Sales Rep role.

Allowed IP Addresses at Company Level	Allowed IP Addresses for Field Sales Rep Role	IP Addresses Allowed for Users	Notes
No IP addresses specified	203.0.113.254	■ IP address 203.0.113.254 is allowed for users who have the Field Sales Rep role. ■ Any IP address is allowed for users who do not have the Field Sales Rep role.	None.
198.51.100.1 through 198.51.100.254	No IP addresses specified	IP addresses 198.51.100.1 through 198.51.100.254 are allowed for all users.	None.
198.51.100.1 through 198.51.100.254	203.0.113.254	■ No IP addresses are allowed for users who have the Field Sales Rep role. ■ IP addresses 198.51.100.1 through 198.51.100.254 are allowed for users who do not have the Field Sales Rep role.	The IP address 203.0.113.254 is not within the range of addresses allowed at company level.
192.0.2.1 through 192.0.2.254	192.0.2.1.50	■ IP address 192.0.2.1.50 is allowed for users who have the Field Sales Rep role. ■ IP addresses 192.0.2.1 through 192.0.2.254 are allowed for users who do not have the Field Sales Rep role.	The IP address 192.0.2.1.50 is within the range of addresses allowed at company level.

Allowed IP Addresses at Company Level	Allowed IP Addresses for Field Sales Rep Role	IP Addresses Allowed for Users	Notes
No IP addresses specified	No IP addresses specified	All users including users who have the Field Sales Rep role can access Oracle CRM On Demand from any IP address.	None.

For information on restricting access to Oracle CRM On Demand to specific ranges of IP addresses at role level, see Adding Roles (on page 1396).

Adding Roles

You can add a role to Oracle CRM On Demand by doing the following:

- Creating a new role
- Copying an existing role, renaming the copy, and then editing the privileges and access rights of the copy

Copying roles is useful if you want to have similar roles, but you want users to see different page layouts. For example, your North American and EMEA executives might want to view opportunity information in different ways, requiring different fields and page layouts for each set of users. To set up this configuration, create two roles that are based on the default Executive role, and name your new roles, *Exec - North America* and *Exec - EMEA.* When you copy the Executive role, the access privileges of the original role are retained for the new role, and you must change only the page layouts so that users to whom you give the new role are presented with the views and fields relevant to their work.

NOTE: You must create the page layouts that you want to associate with the role. For information about creating page layouts, see Record Type Application Customization Page (on page 1199).

TIP: Consider setting up a test user for each role. Then, activate the test user, and make sure the configurations are set up correctly. Do not activate other users until you have completed all user setup activities, including access rights, role settings, reporting and data-sharing hierarchies, workflow rules, and any other business process customization. Deactivate test users when the testing is complete.

Before you begin. Do the following:

- Make sure your role has the Manage Roles and Access privilege.
- If you want to update the Expire User Passwords In field in a role, then make sure your role has the Manage Company privilege.
- Read the guidelines for setting up for roles, see Guidelines for Setting Up Roles (on page 1390).

NOTE: Oracle CRM On Demand generates audit records of all changes to roles. If your user role includes the Access Master Audit Trail and Admin Configuration Audit privilege, then you can view the audit trail of the changes to roles. For more information about viewing the audit trail, see Reviewing the Audit Trail for Administration Configuration Changes (on page 1177).

The following procedure describes how to add a role.

To add a role

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. In the Role Management section, click Role Management.
4. In the Role List page, in the Translation Language field, choose your company's primary language.

5 Do one of the following:

- To create a new role by copying an existing role, click Copy on the role that you want to copy.
- To create a new role that is not based on an existing role, click New Role in the title bar of the page.

The Role Management wizard appears, to lead you through the process. Each step in the Role Management Wizard controls certain settings for the role. All the role settings together determine the access rights for users who have the role.

6 In Step 1, Role Information, provide a name and description, and complete the remaining fields as needed. The remaining fields are described in the following table.

Field	Description
Mark for Translation	The Mark for Translation check box is effective only in both of the following circumstances: - When the name of an existing role is being changed - The existing role name has already been translated into one or more additional languages In these circumstances, you can use the Mark for Translation check box to indicate whether the translated role name is to be replaced by the new name, or is to remain unchanged. Depending on the setting of the Mark for Translation check box, the role name is displayed as follows: - If you select the Mark for Translation check box, then the new name is displayed in the language in which it was entered, regardless of the language used for viewing the list of roles. When the list of roles is viewed in the language in which the new name was entered, the name is displayed in black font. However, when the list of roles is viewed in any other language, the name is displayed in blue font within brackets. - If you do not select the Mark for Translation check box, the new name appears when the list of roles is viewed in the language in which the new name was entered. However, when the list of roles is viewed in any other language, the original translated role name still appears. The Mark for Translation check box does not have any effect when a new role is added. When a new role is added, the new name automatically appears in the list of roles in all languages. When the list of roles is viewed in the language in which the new name was entered, the name of the new role is displayed in black font. When the list of roles is viewed in any other language, the name of the new role is displayed in blue font within brackets.
Default Sales Process	(Optional) To set the default sales process for new opportunities created by users who are assigned this role, choose an option in the Default Sales Process field. For more information about this option, see Setting Up Sales Processes, Categories, and Coaches (on page 1581).
Default Theme	(Optional) The theme that is used by default when a user who is assigned this role signs in to Oracle CRM On Demand using a desktop or laptop computer. Users can override this setting when they edit their personal preferences. If a default theme is not selected in the user's record, then the default theme that is selected for the user's role is used. If a default theme is not selected in

Field	Description
	either the user's record or the user's role, then the default theme that is specified for the company is used. For more information on creating themes, see Creating New Themes (on page 1348).
Tablet Theme	(Optional) The theme that is used when a user who is assigned this role signs in to Oracle CRM On Demand using a tablet computer or other touch-screen device, provided that the tablet computer or touch-screen device is detected by Oracle CRM On Demand. Users can override this setting when they edit their personal preferences. If a tablet theme is not selected in the user's record, then the tablet theme that is selected for the user's role is used. If a tablet theme is not selected in either the user's record or the user's role, then the tablet theme that is specified for the company is used. If a tablet theme is not specified at any level, then the default theme is used.
Action Bar and Global Header Layouts	By default, the standard layout is used for the Action bar and the global header for all roles. You can assign a different layout for the role. If the user uses a classic theme, then the Action bar and global header layout for the role determines which sections are available to the user in the Action bar layout. If the user uses a modern theme, then the Action bar and global header layout for the role determines which sections are available to the user in the Action bar and also determines which sections are available to the user in the global header.
Related Information Format	(Optional) To set a format for related information sections on record Detail pages for the role, choose either Lists or Tabs. This setting determines if the related information sections on record Detail pages are shown as lists or as tabs. This setting can also be set on each user's record, and users whose role has the Personalize Related Information Display Format privilege can set the Related Information Format option in their personal profile. If the Related Information Format field in a user's record is blank, then the setting for the user's role is used; and if the Related Information Format field on the user's role is blank, then the setting for the company is used.
Lead Conversion Layout	(Optional) To set a lead conversion layout (for the Convert Lead page) for the users assigned this role, choose a layout in the Lead Conversion Layout field. If you do not choose a layout for the role, the default layout for the company is used for the role. For information about creating lead conversion layouts, see Creating Lead Conversion Layouts (on page 1572).

Field	Description
Activity List on User Calendar View	(Optional) Select the activity list that is to be displayed in the daily and weekly views of the user's calendar and in that user's view of the calendars that other users share with them. In the standard application, the Open Tasks list is shown, but you can select a different list for the user role. Users can also select a list in the Activity List on User Calendar View field in their calendar settings. If the Activity List on User Calendar View field in a user's calendar settings is blank, then the list selected for the user's role is used, and if the Activity List on User Calendar View field on the user's role is blank, then the Open Tasks list is shown. All public lists, system lists, and lists that are specific to the role for the Activity record type, are available for selection. If the list that you select is later deleted or becomes unavailable to users with this role, and if the Activity List on User Calendar View field in the user's calendar settings is blank, then the Open Tasks list is shown for that user.
Expire User Passwords In	Specifies the length of time that a password is valid for a user who has this role. After this period has elapsed, the user is forced to change the password. This field is blank by default. If you leave this field blank for the role, then the password expiry period that is defined for the company applies to the users who have this role. For information about defining password controls for your company, see Defining Your Company's Password Controls (on page 1152). **NOTE:** If your role does not have the Manage Company privilege, then this field is read-only.
IP Address Restrictions Enabled	(Read-only) If this check box is selected, then you can specify that users who have this role can access Oracle CRM On Demand from certain IP addresses only. You can specify the IP addresses in the Allowed IP Addresses field.

Field	Description
Allowed IP Addresses	If you want to allow the users who have this role to access Oracle CRM On Demand from certain IP addresses only, then enter the valid addresses or ranges of addresses for the role in this field. If you do not enter any addresses in this field, then users who have this role can access Oracle CRM On Demand from any IP address that is allowed at company level. For more information about how IP address restrictions work, see About IP Address Restrictions for Roles (on page 1394). Separate the IP addresses and IP address ranges with commas. The following example shows how to enter several addresses: 192.0.2.1, 192.0.2.10, 192.0.2.15 Use a hyphen (-) to denote an address range, as shown in the following example: 192.0.2.1-3, 192.0.2.50-100, 192.0.2.200-254 **NOTE:** If you restrict the IP addresses for your own user role, and if your current IP address does not come within the range of addresses that you allow for your user role, then you cannot save the changes to the role. This feature prevents you from accidentally locking yourself out of Oracle CRM On Demand.
Maximum Number of Records per List Export	To restrict the number of records that users who have this role can export at one time when exporting a list of records, enter the appropriate value in this field. For example, if you want to restrict users to exporting a maximum of 100 records in a list at one time, then enter 100 in this field. The restriction applies only in the case of records exported through the Export List menu option on List pages. It does not apply to export operations that are performed through the Export Assistant or through any other channel. This field is blank by default, that is, no restriction is applied.

1 In Step 2, Record Type Access, for each record type, select the check box for each access level that you want to grant to the role.

You can select one or more of the following access levels for each record type:

- Has Access
- Can Create
- Can Read All Records

For more information about these access levels, see About Record Type Access in Roles (on page 1392).

CAUTION: Denying access to a record type (by not selecting the Has Access check box for the record type in the Role Management Wizard) can prevent a user from being able to create a record of another record type. For example, if you deny access to a record type that a user must access to create a record based on another record type, you can prevent a user who has the role from being able to create that record.

NOTE: To convert leads or deal registrations, users must have the appropriate access level settings for certain record types. For more information about the access levels that are required for converting leads, see Access Profile and Role Settings for Converting Leads (on page 255). For information about the access levels that are required for converting deal registrations, see Access Profile and Role Settings for Converting Deal Registrations (on page 447).

TIP: When you make changes to the access levels for a role, after you save your changes, users assigned the role must sign out and sign in again for the changes in their role to take effect.

2 In Step 3, Access Profiles, choose the access profiles to assign to this role:

   For more information about access profiles in roles, see About Access Profiles in Roles (on page 1405).

3 In Step 4, Privileges, select the Assign check box for each privilege that you want to grant to the role, or deselect the Assign check box for any privilege you want to revoke from the role.

   Privileges are organized alphabetically by category.

   CAUTION: In some cases, if the Assign check box for a privilege is deselected on the Administrator role, then the privilege is removed from Oracle CRM On Demand, and the company administrator cannot grant that privilege to any other role. If this problem occurs, contact Oracle CRM On Demand Customer Care to restore the privilege.

   For more information about privileges in roles, see About Privileges in Roles (on page 1394).

4 In Step 5, Tab Access and Order, move the tabs to the appropriate section of the page, then click the up and down arrows in the Selected Tabs section to define the order in which the tabs that the user sees by default are displayed.

   The Not Available Tabs section lists the record-type tabs and custom Web tabs that you can make available to the role. The list of record types that appear in this section is determined by Oracle CRM On Demand. Most of the record types that are listed in step 2 of the Role Management Wizard also appear in this list. Other record types, such as Books, do not appear in this list because they cannot be displayed as tabs. The tabs shown in the Not Available Tabs section are not available to users who have the role.

   To make tabs available or visible to users who have this role, do the following:

   - Move tabs that you want users to see by default to the Selected Tabs section. This section lists the record-type tabs and custom Web tabs that are visible by default to any user who has the role, the first time the user signs in with the role. Use the up and down arrows to determine the order in which the tabs are initially displayed. Each user who has the role can customize his or her settings, so that tabs are no longer displayed by default or are displayed in a different order. For more information about how users can manage their personal settings, see Personalizing Your Application.
   - Move tabs that you do not want users to see by default, but which the users can make visible for themselves, to the Available Tabs section. This section lists the record-type tabs and custom Web tabs that are available to the role, but that are not displayed by default. That is, the tabs listed in this section are not displayed to the users until the users make the tabs visible for themselves in their personal layout (available from the My Setup link). Each user who has the role can personalize his or her settings so that the available tabs are displayed by default. Each user can also specify the order in which all of the tabs are displayed.
   - Leave tabs that you want hidden from users in the Not Available Tabs section.

   NOTE: Moving a tab from the Not Available Tabs section to the Available Tabs or Selected Tabs section makes the tab available to the user only if the Has Access check box is selected for the record type in step 2 (Record Type Access) of the Role Management Wizard.

   TIP: You can move a range of tabs at the same time by selecting the top one, holding down the Shift key, and clicking the last one in the range. Then click the right or left arrow.

5 In Step 6, Page Layout Assignment, for each record type, choose if the Page View Type is static or dynamic, then select from the list of page layouts available for that view type.

   Page layouts determine the fields and sections users see on the Create, Edit, and Detail pages for the various record types. Oracle CRM On Demand comes with a standard page layout for each record type. The standard page layouts, which cannot be deleted, are static page layouts. So, the Static option is always available in the Page View Type field. The Dynamic option is available only if there are dynamic page layouts available for the record type. Company administrators can create additional, customized, static page layouts or dynamic page layouts for record types.

For each record type, the standard page layout and any page layouts that are created for the record type are available for assignment to the role. For more information about creating static and dynamic page layouts, see Record Type Application Customization Page (on page 1199).

The default page layout for a record type is the standard, static page layout for that record type.

NOTE: The list of record types that appears in step 6 of the Role Management Wizard is determined by Oracle CRM On Demand. You might see record types such as User Admin and User Owner, which do not appear as tabs in Oracle CRM On Demand.

6 If you want to configure the record indicator settings for the related information sections for a record type, then in Step 6, Page Layout Assignment, do the following:

   a In the row for that record type, click the Configure link in the Manage Record Indicator column to open the page where you configure the record indicator settings.

   b Move each of the related information sections that you want to display the record indicators from the Available Related Information list to the Selected Related Information list.

   NOTE: All of the related information sections that are supported for the record type and also support the record indicator functionality are available for you to select, including the related information sections that are not available in the Detail page layout that is currently selected for the role for that record type. The settings for the record indicators continue to apply to the record type for that role until you change the settings again. So, if you update the Detail page layout that is assigned to the role for a record type, then the record indicator settings apply to the updated layout. Similarly, if you later assign a different Detail page layout to the role, then the record indicator settings apply to the new page layout.

   c When you finish configuring the record indicator settings for the record type, click Previous to return to the main page for Step 6 of the wizard.

   d Repeat steps a through c of this procedure for each record type for which you want to configure the record indicator settings for this role.

   NOTE: Users whose role includes the Personalize Detail Page - Records Indicator privilege can personalize the record indicator settings for the Detail page for a record type. A user's personalized settings for the record indicators override the settings at role level. However, you can remove all personalized page layouts for a record type for a role, including the personalized settings for the record indicators, by resetting the page layout to the default layout. Users whose role includes the Personalize Detail Page - Records Indicator privilege can also reset their own personalized record indicator settings for a record type to the default settings for that record type for the role. For information about resetting page layouts, see Resetting Personalized Page Layouts (on page 1420). For information about the behavior of the record indicators, see About the Record Indicators for Related Information Sections (on page 71). For information about personalizing the record indicator settings, see Managing Record Indicators for Related Information Sections (on page 757).

7 In Step 7, Search Layout Assignment, for each record type, select from the list of available search layouts.

   For each listed record type, the list of available layouts is shown in the Search Layout Name field. Search layouts determine the fields (standard fields and custom fields) that users can use when searching for records, and the fields that users see in search results pages. You can assign a search layout for most of the primary record types that are available to the role as tabs. You can also assign search layouts to other record types that are also searchable, such as Product and User. For more information on creating and modifying customized search layouts, see Managing Search Layouts (on page 1296).

8 In Step 8, Homepage Layout Assignment, for each record type, select from the list of available homepage layouts.

   For each listed record type, the standard Homepage layout and any Homepage layouts that you create for the record type are available for you to assign to the role. The list of record types includes all of the primary record types that are available as tabs for the role.

   Homepage layouts determine what information users see on the Homepage for each record type. Oracle CRM On Demand comes with a default Homepage layout for each primary record type that can appear as a tab. You can create additional, customized Homepage layouts for record types. For more information about creating Homepage layouts, see Creating Record Homepage Layouts (on page 1305).

9 (Optional) In Step 9, New Record Layout Assignment, for each record type, specify the layout that is to be used for the pages where users enter information for new records. The following table describes the fields in Step 9 of the Role Management wizard.

Field	Description
New Record Layout Name	Administrators can set up custom layouts for the pages where users enter information for new records. If any such custom layouts have been created for the record type, then you can select a custom layout from the list in the New Record Layout Name field. By default, no value is selected in this field. If you leave this field blank, then the layout that is assigned to the role for the Detail page in Step 6 of the Role Management wizard is also used for the page where users enter information for new records unless the user has personalized the field layout for the record type, in which case the personalized layout is used.
Quick Create Links Only	Use this check box to specify when the custom layout that you select in the New Record Layout Name field is to be used, as follows: ■ If this check box is deselected, then the custom layout that you select is used when a record is created from any area in Oracle CRM On Demand. ■ If this check box is selected, then the layout that you select is used only when a user creates a record through the Action bar or the global header. When a user creates a record from any other area in Oracle CRM On Demand, the layout for the Detail page for the role is used unless the user has personalized the field layout for the record type, in which case the personalized layout is used. **NOTE:** If you do not select a layout in the New Record Layout Name field, then the Quick Create Links Only check box is not applicable.

1 Click Finish.

Related Topics

See the following topics for related information:

- Role Management (on page 1389)
- Guidelines for Setting Up Roles (on page 1390)
- Working with the Role List Page (on page 1391)
- About Record Type Access in Roles (on page 1392)
- About Access Profiles in Roles (on page 1405)
- About Privileges in Roles (on page 1394)

Access Profile Management

In Oracle CRM On Demand, you manage access profiles in the Access Profiles List page and in the Access Profile Wizard. You access the access profile pages from the global Admin link, which is available on every page in Oracle CRM On Demand.

An *access profile* in Oracle CRM On Demand is a named collection of permissions on primary record types and related record types.

A *primary record type* is a record type that can be used as an independent record type. A *related record type* is a record type that must have a parent record.

Many primary record types can also be used as related record types. For example, Opportunities is a related record type. It is based on the Opportunity primary record type and is related to parent account records that are based on the Account record type.

A *permission* is the ability to read, create, update, or delete data on records that are instances of record types. Permissions are also referred to as access rights or access levels. For each record type, such as accounts, contacts, service requests, and so on, you can set up permissions for the record type itself. For some record types, you can also set up permissions for related record types.

You can set up many access profiles consisting of different permissions for primary record types and related record types. To grant these permissions to authenticated users (including external systems), you associate the access profiles with roles, books, teams, and groups.

Oracle CRM On Demand provides a set of predefined access profiles. The following are some of the standard access profiles:

- Edit
- Full
- ReadOnly
- Administrator Default Access Profile
- Administrator Owner Access Profile

Typically, access profiles are named to distinguish between default access profiles and owner access profiles. (In the list of predefined access profiles, there are pairs of access profiles with the terms *Default* and *Owner* in their names.) These terms help you to identify which access profiles to use in the access profile assignments on user roles, where an owner access profile and a default access profile must be assigned.

The Edit, Full, and ReadOnly access profiles are generic access profiles that can be granted to any role, team, or book member. For example, you can assign the Full access profile to the Owner Access Profile of the Administrator role. In the standard application, the Full access profile gives a user who has the Administrator role the ability to create related records on top-level records, and to retrieve, update, or delete records of all primary record types and their related record types.

NOTE: Administrators can change the access settings on the default access profiles. So, the name of an access profile might not match the actual permissions that the access profile grants to a user.

You can use the predefined access profiles, edit the existing access profiles, and create custom access profiles to meet the requirements of your company. When creating a new access profile, you have the option of copying an existing access profile, giving it a new name, and then editing the copy to meet your requirements.

To view, create or revise access profiles at your company, your role must include the Manage Roles and Access privilege. It is recommended that only company administrators are given the privilege required to manage access profiles, because access profiles directly affect the security of protected data.

Related Topics

See the following topics for related information:

- About Access Profiles in Roles (on page 1405)
- About Access Profiles in Teams, Groups, and Books (on page 1406)
- About Access Propagation Through Team Inheritance (on page 1406)
- Working with the Access Profile List Page (on page 1408)
- About Access Levels for Primary Record Types (on page 1409)
- About Access Levels for Related Record Types (on page 1410)
- Process of Setting Up Access Profiles (on page 1416)

- How Access Rights Are Determined (on page 1464)

About Access Profiles in Roles

Each role in Oracle CRM On Demand has two access profile assignments:

- A default access profile assignment
- An owner access profile assignment

You can assign an access profile to multiple roles, and you can assign the same access profile to be both the default access profile and the owner access profile on a role. For example, you can assign the Full access profile (one of the predefined access profiles) as the default and owner access profiles for the Administrator role.

You assign access profiles to a role in step 3 of the Role Management Wizard. For more information about adding roles, see Adding Roles (on page 1396).

Default Access Profile

The default access profile on a role controls the access rights of a user to records that are not owned by that user, but are visible to the user because the Can Read All Records option is selected for the relevant record type in the record-type access settings on the user's role.

If the Can Read All Records check box on the user's role is deselected for a record type, the user has no access to that record type through the role, and the default access profile on the user role is never used for that record type.

According to the naming convention for access profiles, access profiles that are set up to be assigned as default access profiles are named as follows:

role name Default Access Profile

where:

- *role name* is the name of the role where the access profile is to be used.

For example, the name *Administrator Default Access Profile* indicates that this access profile controls access rights to record types and their related record types for the Administrator role.

Owner Access Profile

The owner access profile on a role controls the access rights of a user to records that are owned by that user or owned by a subordinate of the user.

According to the naming convention for access profiles, access profiles that are set up to be assigned as owner access profiles are named as follows:

role name Owner Access Profile

where:

- *role name* is the name of the role where the access profile is to be used.

For example, the name *Service Manager Owner Access Profile* indicates that this access profile controls access rights to record types and their related record types for the Service Manager role.

Related Topics

See the following topics for related information about access profiles:

- Access Profile Management (on page 1403)
- Process of Setting Up Access Profiles (on page 1416)
- How Access Rights Are Determined (on page 1464)

See the following topics for related information about roles:

About Access Profiles in Teams, Groups, and Books

Access profiles are used to give access rights to users who are members of teams or groups (through user books), and to users who are associated with custom books. (Access profiles are also assigned to roles, as described in About Access Profiles in Roles (on page 1405).) Assigning access profiles to users for teams and books allows users to access records that they would not be able to access if they were restricted to the access rights provided by the access profiles assigned to their role.

NOTE: In Oracle CRM On Demand, a default book is assigned to each user and bears the user's name. When a record is assigned to a user, the record is assigned to the user's default book. Where a record is owned by a team, the team represents the set of default books of the users who are members of the team. When a user becomes a member of a team, the user book for that user is added to the set of user books that makes up the team. User books are automatically associated with records when the record owner is changed and when team membership is changed.

Groups are predefined teams that are supported for certain record types. When the owner of a record is a member of a group, other members of that group are automatically added to the team on that record. The group members are given full access to the record by default, and the access level cannot be changed.

Each user book in a team must be given an access profile that controls the user's access rights to the records that they can access through their membership of the team. You can make any access profile available for assignment to team membership by selecting the Grantable to Team Members check box on the access profile.

Similarly, each user associated with a custom book must be given an access profile that controls the user's access to records in that custom book. You can make any access profile available for assignment to a user's association with a book by selecting the Grantable to Book Users check box on the access profile.

For more information about user books and custom books, see Book Management (on page 1421).

Related Topics

See the following topics for related information:

About Access Propagation Through Team Inheritance

Team inheritance is the automatic addition of the members of an account team to the teams for the records that are linked to the account. Team inheritance is available as an option for contacts and opportunities that are related to a parent account. Team inheritance is not supported for any other type of team relationship.

NOTE: When a user becomes a member of a team, the user book for that user is added to the set of user books that makes up the team. Oracle CRM On Demand does not distinguish between users who are added to a team through the team inheritance feature, and users who are added to a team manually (that is, the user books that are added to a team through the team inheritance feature are treated the same as user books that are added to a team manually).

About Team Inheritance for the Contact Record Type

For the Contact record type, team inheritance is controlled by the Enable Parent Team Inheritance for Contact check box on the Company Profile page. If this check box is selected, then the teams on the contacts that are linked to a parent account inherit the members of the parent account team as follows:

- When a contact is related to a parent account:
  - Each account team member (including the account owner) becomes a member of the contact team, provided that an access profile is specified in the Contact Access field in the user record on the account team.
  - The owner of the account is granted the Full access profile for membership of the contact team by default, even if the Full access profile is deactivated.
- When a new member is added to an account team, the user's membership of the teams for the contacts that are related to the account is determined as follows:
  - If an access profile is specified in the Contact Access field in the user record on the account team, then the new member of the account team also becomes a member of the contact team for each contact related to the account. Also, the access profile for the user on the contact team for each related contact is updated to be the same as the access profile for the user on the account team.
  - If an access profile is not specified in the Contact Access field in the user record on the account team, then the new member of the account team is not added to the contact team for any of the contacts related to the account. If the user is already a member of the contact team for a contact that is related to the account, then the user is removed from the contact team of that contact.
- When an account owner is changed:
  - The new owner becomes a member of the contact teams on all related contact records.
  - The previous account owner remains a member of the contact teams to which the previous account owner was already added.
- When a user is removed from an account team, the user remains a member of the contact teams to which the user was added through team inheritance.

About Team Inheritance for the Opportunity Record Type

For the Opportunity record type, team inheritance is controlled by the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page. If this check box is selected, then the teams on the opportunities that are linked to a parent account inherit the members of the parent account team as follows:

- When an opportunity is related to a parent account:
  - Each account team member (including the account owner) becomes a member of the opportunity team, provided that an access profile is specified in the Opportunity Access field in the user record on the account team.
  - The owner of the account is granted the Full access profile for membership of the opportunity team, even if the Full access profile is deactivated.
- When a new member is added to an account team, the user's membership of the teams for the opportunities that are related to the account is determined as follows:
  - If an access profile is specified in the Opportunity Access field in the user record on the account team, then the new member of the account team also becomes a member of the opportunity team for each opportunity related to the account. Also, the access profile for the user on the opportunity team for each related opportunity is updated to be the same as the access profile for the user on the account team.
  - If an access profile is not specified in the Opportunity Access field in the user record on the account team, then the new member of the account team is not added to the opportunity team for any of the opportunities related to the account. If the user is already a member of the opportunity team for an opportunity that is related to the account, then the user is removed from the opportunity team of that opportunity.
- When an account owner is changed:

- The new owner becomes a member of the opportunity teams for all related opportunity records.
- The previous account owner remains a member of the opportunity teams to which the previous account owner was already added.

- When a user is removed from an account team, the user remains a member of the opportunity teams to which the user was added through team inheritance.

What Happens If Team Inheritance Is Disabled?

Team inheritance might grant too much access to the account team members who become members of the teams on related contact and opportunity records. If so, then you can disable team inheritance for the Contact record type, or the Opportunity record type, or both, by deselecting the relevant check boxes on the Company Profile page.

If team inheritance is disabled for the Contact record type, then membership of account and contact teams behaves as follows:

- The Contact Access field in the user records on account teams is not displayed.
- Users that are added as new members of an account team are not added to the contact teams on the contacts that are linked to the account.
- If team inheritance was previously enabled for the Contact record type, and if you disable it, then users who became members of teams through the team inheritance feature remain as members of those teams.

If team inheritance is disabled for the Opportunity record type, then membership of account and opportunity teams behaves as follows:

- The Opportunity Access field in the user records on account teams is not displayed.
- Users that are added as new members of an account team are not added to the opportunity teams on the opportunities that are linked to the account.
- If team inheritance was previously enabled for the Opportunity record type, and if you disable it, then users who became members of teams through the team inheritance feature remain as members of those teams.

Related Topics

See the following topics for related information:

- Access Profile Management (on page 1403)
- Process of Setting Up Access Profiles (on page 1416)
- How Access Rights Are Determined (on page 1464)

Working with the Access Profile List Page

On the Access Profile List page, you can perform the actions in the following table.

To do this	Follow these steps
Add a new access profile	In the title bar of the Access Profile List page, click New. The Access Profile Wizard opens. For more information about using the Access Profile Wizard, see Process of Setting Up Access Profiles (on page 1416).
Add a new access profile by copying an existing access profile	In the record-level menu beside the access profile name, select Copy. The Access Profile Wizard opens. For more information about using the Access Profile Wizard, see Process of Setting Up Access Profiles (on page 1416).

To do this	Follow these steps
Disable an access profile	Select the Disabled check box for the access profile. When you disable an access profile, it cannot be used in any new associations with roles, teams, or books. However, the disabled access profile continues to function as the access profile where it has been associated previously with a role, team, or book until you assign a different access profile to the role, team, or book.
Select a language for viewing the list of access profiles	In the title bar of the Access Profile List page, in the Translation Language field, select the language in which you want to view the list of access profiles. You can view the list in any of the languages that are supported for your company in Oracle CRM On Demand. **NOTE:** If an existing access profile does not have a translated access profile name, the name of the access profile is not translated and appears in brackets.

If the Alpha Search controls are available, then you can use Alpha Search to filter the list of access profiles. For more information about Alpha Search, see Filtering Lists (on page 136).

Related Topics

See the following topics for related information:

- Access Profile Management (on page 1403)
- Process of Setting Up Access Profiles (on page 1416)
- How Access Rights Are Determined (on page 1464)

About Access Levels for Primary Record Types

You grant or revoke access rights to primary record types by setting the access levels in step 2 of the Access Profile Wizard. For more information about using the Access Profile Wizard, see Process of Setting Up Access Profiles (on page 1416).

Access levels are the lowest level of permissions that can be granted for a record type. For each primary record type, you specify the access rights for any user who inherits this access profile through one or more of the access-control components (roles, reporting hierarchy, teams, and books). For example, when a user drills down on an opportunity from an opportunity list, the access rights that allow the user to see the opportunity details and to perform operations are controlled by the access level for the Opportunity primary record type in step 2 of the Access Profile Wizard.

The description in this section of the access levels for primary record types pertains to the functionality of the access levels as they operate individually. The records that a user can view and the operations that a user is allowed to perform on records are controlled by a combination of one or more access levels that are applied to the records through one or more access profiles.

Record types that are controlled through special privileges appear in all access profiles with the access level set by default. For primary record types, the default setting is Read-Only. You must change the default setting to give your users the access level that they require for the various record types.

The access level for each primary record type can be set to one of the following:

- **Read-Only.** The Read-Only access level prevents the user from performing operations such as edit or delete on the primary record.
- **Read/Edit.** The Read/Edit access level allows the user to view and edit primary records.

- **Read/Edit/Delete.** The Read/Edit/Delete access level allows the user to view, edit, and delete primary records.

NOTE: Permission to create records of a primary record type is not controlled by the settings in step 2 of the Access Profile Wizard. The permission to create records of a primary record type is controlled by the settings in step 2 of the Role Management Wizard. For more information about roles, see Role Management (on page 1389).

Related Topics

See the following topics for related information:

- Access Profile Management (on page 1403)
- Process of Setting Up Access Profiles (on page 1416)
- How Access Rights Are Determined (on page 1464)

About Access Levels for Related Record Types

You grant or revoke access rights to related record types in step 2 of the Access Profile Wizard. For more information about using the Access Profile Wizard, see Process of Setting Up Access Profiles (on page 1416).

Related record types that are controlled through special privileges appear in all access profiles with the access level set to No Access by default. You must change the default setting to give your users the level of access that they require to the various record types.

For example, the Custom Object 04 record type is a related record type on the parent Opportunity record type. In the Full access profile, the Custom Object 04 related record type has its access level set to No Access by default. As a result, a user who is on an opportunity team with the Full access profile cannot see the related record types based on the Custom Object 04 related record type. If you want the user to see the Custom Object 04 records on opportunity records, you must change the default access level.

This topic describes the following:

- Record Relationships
- Access Level Options for Related Record Types

Record Relationships

The relationship between a parent record type and its related record type (the child record) determines the access-level options that are available for assignment to the related record type.

The relationships types and the available access level options are as follows:

- **One-to-many relationship.** In a one-to-many relationship, the parent record can have many child records of the related record type. For example, the Assets related record type is available in the Account Related Information page in the Access Profile Wizard. The Account parent record type has a one-to-many relationship with the Assets related record type. The following access levels are available for the one-to-many relationship:
  - View
  - Read-only
  - No Access
- **One-to-many-primary relationship.** In a one-to-many-primary relationship, the related record type is based on a primary record type, and the access rights of the primary record type can determine the access rights for the related record type. The parent record in a one-to-many-primary relationship can have many child records of the related record type. For example, the Opportunities related record type in the Account Related Information page is based on the Opportunity primary record type. The Account parent record type has a one-to-many-primary relationship with the Opportunities related record type. The following access levels are available for the one-to-many-primary relationship:
  - View

- Read-only
- No Access
- Inherit Primary

- **One-to-child relationship.** In a one-to-child relationship, the child records are based on a record type that does not have a corresponding primary record type. Attachments, Notes, and Teams are some examples of related record types that do not have a corresponding primary record type.

  NOTE: An exception to this rule is the relationship between contact child records on an opportunity. Although the Contact record type has a corresponding primary record type, the relationship between the opportunity and the contacts is a one-to-child relationship. Users can add existing contacts to an opportunity, or remove contacts from an opportunity. Users cannot create new contacts from an opportunity.

  The following access levels are available for the one-to-child relationship:

  - Read/Create
  - Read/Create/Edit
  - Read/Edit
  - Read/Edit/Delete
  - Read-Only
  - No Access
  - Full

- **One-to-read-only relationship.** The one-to-read-only relationship is similar to the one-to-child relationship. However, as the name of the relationship suggests, users cannot edit or create the child records in a one-to-read-only relationship. Audit Trail is an example of a related record type that does not have a corresponding primary record type. Oracle CRM On Demand creates the Audit Trail record type. The following access levels are available for the one-to-read-only relationship:

  - Read-Only
  - No Access

- **Many-to-many relationship.** In a many-to-many relationship, the parent record type and the related record type are both based on primary record types, and the records of each record type can be the parent or child of the other, depending on how you view the relationship. For example, the Accounts related record type in the Custom Object 01 Related Information page in the Access Profile Wizard is based on the Account primary record type. The Custom Object 01 parent record type has a many-to-many relationship with the Accounts related record type.

  NOTE: The relationships between two record types can be different, depending on which record type is the parent, and which record type is the related record type. For example, although the Custom Object 01 parent record type has a many-to-many relationship with the Accounts related record type, the Account parent record type has a many-to-many-primary relationship with the Custom Objects 01 related record type.

  The following access levels are available for the many-to-many relationship:

  - Read/Create
  - Read-Only
  - View
  - No Access

- **Many-to-many-primary relationship.** A many-to-many-primary relationship is also a relationship in which the parent record type and the related record type are both based on primary record types, and the records of each record type can be the parent or child of the other. However, some additional access levels are available in the cases where the access rights of the primary record type can determine the access rights for the related record type. For example, the Custom Objects 01 related record type in the Account Related Information Page in the Access Profile Wizard Account is based on the Custom Object 01 primary record type. The Account parent record type has a many-to-many-primary relationship with the Custom Objects 01 related record type. The following access levels are available for the many-to-many-primary relationship:

- Read/Create
- Read-Only
- View
- No Access
- Inherit Primary
- Add/Inherit Primary
- Add/Remove/Inherit Primary

NOTE: The Read/Create access level is not supported for the following record types: Call Product Detail Message Responses, Call Product Detail Messaging Plan Item Relations, and Call Product Detail Messaging Plan Items.

Access Level Options for Related Record Types

The full set of access level options for related record types is as follows:

- **No Access.** The No Access option is available for all related record types. It prevents the user from viewing records in a related list.
- **Read-Only.** The Read-Only access level prevents the user from editing the related records inline on the parent record.
- **Read/Create.** The Read/Create access level is available for related record types that are one-to-child records or are part of many-to-many relationships. For one-to-child records, the Read/Create access level allows the user to create a new record or drill down on existing records to view the details, but it does not allow the user to edit or delete records. For many-to-many relationships, the Read/Create access level allows the user to associate an existing record as a child on a parent record, but it does not allow the user to remove an existing association.
- **Read/Create/Edit.** The Read/Create/Edit access level is available for related record types that are one-to-child records. It allows the user to create a new record or drill down on existing records to view the details and edit the record if required. The Read/Create/Edit access level does not allow the user to delete child records.
- **Read/Edit.** The Read/Edit access level is available for all relationships except related records that are read-only in one-to-read-only relationships. The Read/Edit access level allows the user to view and edit related records.
- **Read/Edit/Delete.** The Read/Edit/Delete access level is available for related record types that are child records in one-to-child relationships. The Read/Edit/Delete access level allows the user to drill down on existing records to view the record details, to edit the record, or to delete the record. The Read/Edit/Delete access level does not allow the user to create new child records.
- **Full.** The Full access level is available for related record types that do not have a corresponding primary record type. For such record types, the Full access level allows the user to create, view, edit, and delete records.
- **View.** The View access level is available for related record types in one-to-many and many-to-many relationships only. With the View access level, the behavior of the related records is as follows:
  - All the child records that are related to a parent record are shown in the list of related records, irrespective of whether the user is authorized to see the child records themselves.
  - Each related record inherits the access level from its own primary record type rather than the access level of the parent record type in the relationship.

  For example, if the access level is set to View for the related Opportunity record type on the Account parent record type, then the behavior of the related opportunity records is as follows:
  - All opportunities that are related to a parent account record are shown in the list of related records, irrespective of whether the user is authorized to see the opportunity records.
  - Each opportunity record inherits the access level from the primary Opportunity record type and not from its parent Account record type. When a user attempts to drill down on a related opportunity record to see more details of the record, the operation is successful if the opportunity record still exists, and only if the

user is authorized to see the details of that opportunity record. If the user is not authorized to see the details of that opportunity record, then the user sees an error message.

- **Inherit Primary.** The Inherit Primary access level is available for certain one-to-many and many-to-many related record types only. With the Inherit Primary access level, the behavior of the related records is as follows:
  - Only the related child records that the user is authorized to see are shown in the list of related records.
  - Each related record inherits the access level from its own primary record type rather than the access level of the parent record type in the relationship.

  For example, if the access level is set to Inherit Primary for the related Opportunity record type on the Account parent record type, then the behavior of the related opportunity records is as follows:
  - Only those related opportunity records that the user is authorized to see are shown in the list of related records.
  - Each opportunity record inherits the access level from the primary Opportunity record type and not from its parent Account record type. When a user attempts to drill down on a related opportunity record to see more details of the record, the operation is always successful if the opportunity record still exists because the user is authorized to see the details of all of the opportunity records in the list of related records.

  For many-to-many relationships, selecting the Inherit Primary access level means that the user cannot add or remove a relationship between two existing records. However, the Inherit Primary access level is also available in combination with the Add access right, or in combination with the Add and Remove access rights.

  NOTE: If the Inherit Primary access level (or any of its combinations) is found on any of the profiles used for a related record type, the Inherit Primary setting takes precedence. For example, if the Inherit Primary and View access levels are both found, the Inherit Primary access level overrides the View access level. If the Inherit Primary, Read-Only, and View access levels are all found, the Inherit Primary access right overrides the View and Read-Only access levels.

- **Add/Inherit Primary.** The Add/Inherit Primary access level is available for related records that share a many-to-many relationship with the parent. The Inherit Primary element of the Add/Inherit Primary access level works in the same way as the Inherit Primary access level. However, the Add/Inherit Primary access level also allows the user to associate an existing related record with the parent record. If a related record is successfully added, that record inherits the access level of its primary record. The Add/Inherit Primary access level does not allow users to remove an existing related record.
- **Add/Remove/Inherit Primary.** The Add/Remove/Inherit Primary access level is available for related records that share a many-to-many relationship with the parent. The Inherit Primary element of the Add/Remove/Inherit Primary access level works in the same way as the Inherit Primary access level. However, the Add/Remove/Inherit Primary access level also allows the user to associate an existing related record with the parent record, or to remove (dissociate) the link between the records. When a user removes or dissociates a related record, the record is not deleted and remains in the database. If a related record is successfully added, that record inherits the access level of its primary record.

As a general rule, for the related record types shown in the following table, the Inherit Primary access level is supported in all cases in which the record type is available as a related record type. However, the following exceptions apply:

- For the Household parent record type, the Leads related record type does not support the Inherit Primary access level.
- For the Partner parent record type, the Opportunity related record type does not support the Inherit Primary access level.

If the access level is currently set to View for any of the relationships indicated in the following table, then it is recommended that you change the access level from View to Inherit Primary.

NOTE: The access level that you set for the Completed Activities related record type applies to the records that are shown in the Completed Activities related information section in a parent record Detail page. The access level that you set for the Activities or Open Activities related record types applies to the records that are shown in the

Activities, Open Tasks, Open Appointments, and Open Activities related information sections in a parent record Detail page.

Related Record Type
Accreditation Requests
Activities
Attendee Call
Business Plans
Call Product Detail Message Responses
Call Product Detail Messaging Plan Item Relations
Call Product Detail Messaging Plan Items
Calls
Certification Requests
Completed Activities
Course Enrollments
Custom Objects 01 and higher
Exam Registrations
Financial Account: Account Holder
Financial Account: Branch
Financial Account: Held Away Institution
Financial Accounts
Leads
Message Responses
Messaging Plan Item Relations
Messaging Plan Items
Objectives

Related Record Type
Open Activities
Opportunities
Plan Accounts
Plan Contacts
Plan Opportunities
Service Requests
Sub-Opportunities
Transaction Items

The following table lists the relationships where the Inherit Primary, Add/Inherit Primary, and Add/Remove/Inherit Primary access levels are all available. The relationships in this table are many-to-many relationships.

NOTE: If you currently use the Read/Create access level for any of the many-to-many relationships that support the Inherit Primary access level and its combinations, then it is recommended that you change the Read/Create access level to one of the Inherit Primary combinations on the related record types.

Parent Record Type	Related Record Type
Account	Custom Objects 01 through 03
Activity	Custom Objects 01 through 03
Campaign	Custom Objects 01 through 03
Campaign	Opportunities
Contact	Calls
Contact	Completed Activities
Contact	Custom Objects 01 through 03
Contact	Open Activities
Contact	Opportunities
Custom Objects 01 through 03	Completed Activities
Custom Objects 01 through 03	Custom Objects 01 through 03
Custom Objects 01 through 03	Open Activities

Parent Record Type	Related Record Type
Custom Objects 01 through 03	Leads
Custom Objects 01 through 03	Opportunities
Custom Objects 01 through 03	Service Requests
Dealer	Custom Objects 01 through 03
Dealer	Service Requests
Fund	Custom Objects 01 through 03
Household	Custom Objects 01 through 03
Lead	Custom Objects 01 through 03
Event	Custom Objects 01 through 03
Opportunity	Custom Objects 01 through 03
Partner	Custom Objects 01 through 03
Portfolio	Custom Objects 01 through 03
Service Request	Custom Objects 01 through 03
Solution	Custom Objects 01 through 03
Solution	Service Requests
Vehicle	Custom Objects 01 through 03

Related Topics

See the following topics for related information:

- Access Profile Management (on page 1403)
- Process of Setting Up Access Profiles (on page 1416)
- How Access Rights Are Determined (on page 1464)

Process of Setting Up Access Profiles

This topic describes how to set up access profiles.

NOTE: Oracle CRM On Demand generates audit records of all changes to access profiles. If your user role includes the Access Master Audit Trail and Admin Configuration Audit privilege, then you can view the audit trail of the changes to access profiles. For more information about viewing the audit trail, see Reviewing the Audit Trail for Administration Configuration Changes (on page 1177).

Before you begin. To view, create, or revise access profiles at your company, your role must include the Manage Roles and Access privilege.

To set up an access profile, perform the following tasks:

1. Adding Access Profiles (on page 1417).
2. Specifying Access Levels for Primary Record Types (on page 1418).
3. Specifying Access Levels for Related Record Types (on page 1419).

For links to topics that provide additional information about access profiles, see Related Topics for Access Profiles (on page 1419).

Adding Access Profiles

You can add an access profile by doing the following:

- Creating a new profile
- Copying an existing profile and editing its access levels

The following procedure describes how to add an access profile.

To add an access profile

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the Access Profile Management section, click the Access Profiles link.
4. In the Access Profile List, do one of the following:
   - To create a new profile based on an existing profile, click Copy on the profile that you want to copy.
   - To create a new profile that is not based on an existing profile, click New in the title bar.

   The Access Profile Wizard opens to guide you through the process.
5. In Step 1 of the Access Profile Wizard, provide a name and description, and set the remaining fields as needed. The remaining fields are described in the following table.

Field	Description
Mark for Translation	The Mark for Translation check box is effective only in both of the following circumstances: ■ When the name of an existing access profile is being changed ■ The existing access profile name has already been translated into one or more additional languages In these circumstances, you can use the Mark for Translation check box to indicate whether the translated access profile name is to be replaced by the new name or it is to remain unchanged. Depending on the setting of the Mark for Translation check box, the access profile name is displayed as follows: ■ If you select the Mark for Translation check box, then the new name is displayed in the language in which it was entered, regardless of the language used for viewing the list of access profiles. When the list of access profiles is viewed in the language in which the new name was entered, the name is displayed in the default font. However, when the list of access profiles is viewed in any other language, the name is displayed in blue font within brackets.

Field	Description
	■ If you do not select the Mark for Translation check box, then the new name appears when the list of access profiles is viewed in the language in which the new name was entered. However, when the list of access profiles is viewed in any other language, the original translated access profile name still appears. The Mark for Translation check box does not have any effect when a new access profile is added. When a new access profile is added, the new name automatically appears in the list of access profiles in all languages. When the list of access profiles is viewed in the language in which the new name was entered, the name of the new access profile is displayed in the default font. When the list of access profiles is viewed in any other language, the name of the new access profile is displayed in blue font within brackets.
Grantable to Team Members	To make the access profile available to assign to team members, select this check box.
Grantable to Book Users	To make the access profile available to assign to book users, select this check box. For more information, see Creating Access Profiles for Books (on page 1450).
Disabled	If you select this check box, then the access profile is disabled. A disabled access profile cannot be used in any new associations with roles, teams, or books. However, the disabled access profile continues to function as the access profile where it has been associated previously with a role, team, or book until you assign a different access profile to the role, team, or book.

NOTE: By default, the Grantable to Team Members and Grantable to Book Users check boxes are selected on the predefined Edit, Full and ReadOnly access profiles. Therefore, when a user adds another user to a team or a book, the picklist of access profiles that appears in the Add Users or Edit Users dialog box includes these predefined access profiles. If you want to prevent users from assigning any of these three access profiles to a user in a book or a user book in a team, deselect the appropriate check box for that access profile.

Specifying Access Levels for Primary Record Types

To specify access levels for primary record types, complete the steps in the following procedure.

To specify access levels for primary record types

1. In Step 2 of the Access Profile Wizard, select the access level for each of the primary record types. Choose from:
   - Read-Only
   - Read/Edit
   - Read/Edit/Delete

   For more information about the access levels for primary record types, see About Access Levels for Primary Record Types (on page 1409).
2. If you want to specify access levels for the related record types for a primary record type, click the Related Information link for the primary record type. Otherwise, click Finish to save your changes.

Most record types have a Related Information link. Related information appears as linked records on the record Detail pages. For more information about specifying access levels for related record types, see Specifying Access Levels for Related Record Types (on page 1419).

Specifying Access Levels for Related Record Types

To specify the access levels for related record types, complete the steps in the following procedure.

To specify access levels for related record types

1. In step 2 of the Access Profile Wizard, click the Related Information link for the primary record type for which you want to specify the access level for one or more related record types.
2. Select the appropriate access level for each related information record type.

   The picklist of the access level options that appears in the access level field for each related record type depends on the relationship of the related record type to its parent record type. Depending on the access level that you set in this field and in the Role Management Wizard, you can grant or revoke users' rights to create, update, or view records of that record type.

   For more information about the access levels for related record types, see About Access Levels for Related Record Types (on page 1410).

   NOTE: To create a new opportunity, the access level for the Revenue related record type on the Opportunity record type must be set to Full.

   For information about the access profile settings that are required for converting leads, see Access Profile and Role Settings for Converting Leads (on page 255). For information about the access profile settings that are required for converting deal registrations, see Access Profile and Role Settings for Converting Deal Registrations (on page 447).
3. When you finish setting the access levels on the related record types for a primary record type, click Previous to return to the main page of step 2 of the wizard.
4. Repeat steps 1 through 3 of this procedure for each primary record type for which you want to specify the access levels for one or more related record types.
5. When you finish setting the access levels for all of the primary record types and their related record types, click Finish to save your settings.

Related Topics for Access Profiles

See the following topics for related information:

- Access Profile Management (on page 1403)
- About Access Profiles in Roles (on page 1405)
- About Access Profiles in Teams, Groups, and Books (on page 1406)
- About Access Propagation Through Team Inheritance (on page 1406)
- Working with the Access Profile List Page (on page 1408)
- How Access Rights Are Determined (on page 1464)

Personalization Management

Users can personalize certain areas of Oracle CRM On Demand, such as the record Detail page layouts, Homepage layouts, and Action bar layouts. However, if you want users who have a certain role to stop using personalized layouts and to use the default layouts for their role again, then you can remove the personalized layouts for those users. For example, you can remove all personalized Homepage layouts for users who have the Sales Rep role, or remove all personalized Action bar layouts for users who have the Sales Manager role.

For more information on managing personalization in Oracle CRM On Demand, see the following topics:

- Resetting Personalized Page Layouts (on page 1420)
- Resetting Personalized Action Bar Layouts (on page 1420)
- Resetting Personalized Homepage Layouts (on page 1420)

Resetting Personalized Page Layouts

You can remove all personalized page layouts for users with a specific role in Oracle CRM On Demand and restore the default page layout for that role. When you reset the layout to the default layout for a record type for a role, the following happens:

- All personalized related information layouts are restored to the default layout.
- All personalized field layouts are restored to the default layout.
- All personalized settings for displaying record indicators for related information sections are restored to the settings configured for the record type at role level.

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

To reset personalized page layouts

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, in the Personalization Management section, click the Reset Page Layouts link to open the Page Layout Reset page.
4. In Step 1, Select Role, select the role for which you want to reset the page layout, and click Next.
5. In Step 2, Select Layout, choose the record type layouts that you want to reset by moving record types from the Available section to the Selected section using the left and right arrows, and click Next.
6. In Step 3, Confirm, verify your selections, and then click Finish to save your changes.

NOTE: After you reset a page layout for a user role, users who have the role must sign out of Oracle CRM On Demand and sign in again to see the change to the layout.

Resetting Personalized Action Bar Layouts

You can remove all personalized action bar layouts for users with a specific role in Oracle CRM On Demand and restore the default action bar layout for that role.

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

To reset personalized action bar layouts

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the Reset Action Bar Layouts link.
4. On the Action Bar Layout Reset page, select which role you want to reset the action bar layout for, and click Next.
5. On the Summary Page, click Finish.
6. On the Summary Page, click Finish.

Resetting Personalized Homepage Layouts

You can remove all personalized homepage layouts for users with a specific role in Oracle CRM On Demand and restore the default homepage layout for that role.

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

To reset personalized homepage layouts

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. On the User Management and Access Controls page, click the Reset Homepage Layouts link.
4. On the Homepage Layout Reset page, select which role you want to reset the page layout and click Next.
5. In the Select Layout page, choose the homepage layouts that you want to reset by moving the available homepage layouts from the Available section to the Displayed section using the left and right arrows, and click Next.

Book Management

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

Using books to organize your company data makes searches for records faster and more efficient. Books can coexist with groups and teams. If your requirements for providing access to groups of users are straightforward and relatively simple, you can use group assignment. However, if the requirements of group-record ownership are more complex, you are recommended to use books.

Default User Books

In Oracle CRM On Demand, a default book is assigned to each user, and bears the user’s name. When a record is assigned to a user, the record is assigned to the user's default book. Where a record is owned by a team, the team represents the set of default books of the users who are members of the team. User books are automatically associated with records when the record owner is changed, and when team membership is changed.

Custom Books

When the book functionality is enabled, you can create custom books to organize your data to suit your business purposes. Typically, custom books are referred to as *books*. Books can be independent of each other, or you can organize your books into hierarchies. For example, you can create books to segment your data according to the organizational units of your business, such as territories or products. You can then set up users to have the appropriate level of access to the books.

Books Created Automatically for Partners

When a partner record is made active in Oracle CRM On Demand, a book that can contain data is automatically created for the partner organization. The books that are automatically created for partners are available for selection in the Book lookup window that is accessed from the Partner record pages when in the Books related item on a partner record. The Partner record pages are accessible to users in the brand owner company only. If the Access to Partner check box or the Reciprocal Access to Partner (Reverse) check box is selected when a partner relationship is added to a partner record, the books that were automatically created for the related partners are synchronized. Then, wherever partner accounts are associated in Oracle CRM On Demand, the partner users who are associated with each of the synchronized partner books can see the partner accounts to which their partner organization is related.

When a user is added to a partner organization, the user is also automatically associated with the partner book for the partner organization.

Custom Books for Partners

You can also create custom books for partner organizations. You can assign any combination of users, including users from the brand owner company, and users in partner organizations, to such custom books, as required.

Record Types Supported for Books

In the same way that records of different types can be assigned to the same user, records of different types can be assigned to the same book. The following record types can be assigned to books:

- Account
- Accreditation
- Allocation
- Application
- Appointment
- Asset
- Business Plan
- Campaign
- Certification
- Contact
- Course
- Custom Objects
- Deal Registration
- Dealer
- Event
- Exam
- Financial Account
- Financial Plan
- Fund
- HCP Contact Allocation
- Household
- Inventory Audit Report
- Inventory Period
- Lead
- MDF Request
- Messaging Plan
- Objective
- Opportunity
- Order
- Partner
- Policy
- Portfolio
- Program
- Sample Lot
- Sample Request
- Sample Transaction
- Service Request
- Smart Call
- Solution
- Special Pricing Request
- Task
- Vehicle

Books in the Book Selector

If the Book selector is enabled for the company, the Book selector field appears in targeted searches and advanced searches, in the title bar of list pages, and in the Analytics Homepage. The Book selector is used to limit a targeted search to a custom book or a user book that can contain the record that the user wants to find. The plus sign (+), which appears in the Book selector field, indicates the presence of sublevels.

NOTE: Partner books appear in the Book selector for the Partner record type only.

Clicking the icon next to the Book selector displays the book hierarchy, which is organized as follows:

- **All.** The default root node for all books, including custom books and user books
  - **Books.** The default root node for all custom books set up for your company
  - **Users.** The default root node for all user books

All, Books, and Users are nodes or anchors. They are not real books. As an example of a book hierarchy, assume that a company sets up a geographic book hierarchy for America. Assume that a user, John Williams, who has subordinates, is also associated with the books in the geographic hierarchy. For this user, the following hierarchy is shown in the Book selector, under the All option:

- **Books**
  - **America** (The parent book)
    - **North** (Subbook. A subbook can also be a parent book for a further level of subbooks.)
    - **East** (Subbook)
    - **West** (Subbook)
    - **South** (Subbook)
- **Users**
  - **John Williams** (User who has subordinates)
    - **Lucy Harris** (Subordinate. A subordinate can also have subordinates.)
    - **Rick Rogers** (Subordinate)
    - **Donna Jones** (Subordinate)
    - **Jeff Smith** (Subordinate)

NOTE: Books at the lowest level of a hierarchy are called leaf-node books.

The Include Sub-Items check box in the Book selector allows the user to specify that data in subitems (subordinates or subbooks) is to be included in the search. For information about how the Book selector works in reports, see About Visibility to Records in Analytics (on page 807) and About Limitations in Analytics (on page 817).

Selecting Books for Searches

When searching for records, users select the book that contains the data they want to find. If users cannot be sure which book at a certain level of a book hierarchy contains the data they are looking for, the users select the next book higher up in the hierarchy for the search.

If the user selects the Include Sub-Items option in the Book selector, and the Manager Visibility Enabled check box is selected in the company profile, the data in the subbooks or subordinates is included in the search.

As an example, consider the following book hierarchy:

- America
  - North
    - North Area 1
    - North Area 2

If a user is unsure whether a record is in North Area 1 or North Area 2, the user selects the North book for the search, rather than selecting the America book.

Related Topics

For information about designing your book structures, setting up books, and enabling users to use books, see the following topics:

- About Designing Book Structures (on page 1424)
- About Web Services Support for Books (on page 1428)
- About Record Ownership Modes (on page 1428)
- Record Ownership Modes and Automatically Generated Tasks (on page 1432)
- About Importing Books and Book Assignments (see About Importing Books and Book Assignments on page 1436)
- About Time-Based Book Assignments (on page 1437)
- Scenario for Using Books to Manage Sales Territories (on page 1439)
- Example of Using Books to Manage Sales Territories (on page 1440)
- Process of Setting Up Books (on page 1441)
- Verifying Book Setup for the Administrator Role (on page 1441)
- Creating Book Types and Book User Roles (on page 1445)
- Configuring Record Ownership Modes (on page 1446)
- Creating Books and Book Hierarchies (on page 1446)
- Associating Users with Books (on page 1448)
- Creating Access Profiles for Books (on page 1450)
- Enabling Books for Your Company (on page 1451)
- Enabling Books for Users and User Roles (on page 1451)
- Adding Books to Record Detail Page Layouts (on page 1453)
- Assigning Records to Books (on page 1454)
- Book Hierarchy Page (on page 1456)
- Book Fields (on page 1457)
- Information about Troubleshooting Books (on page 1458)

About Designing Book Structures

To set up an efficient book structure, you must plan your book hierarchies carefully. Consider the following guidelines when you design and refine the book hierarchies for your company:

- Do not create custom books that replicate user books.
- Determine the organization and access policies for your business data.
- Determine whether the corporate structure is relevant to data management.
- Determine the data affiliations in your company.
- Design your books based on user needs, and consider the tasks where users most commonly use books.
- Design your books so that the functionality provided by the Manager Visibility Enabled check box on the company profile is used as little as possible.
- Keep the number of levels in your book hierarchies to a minimum.
- As far as possible, reduce the amount of cross-listing in the book structure. *Cross-listing* is the practice of duplicating records across multiple books.
- Use workflow rules to automate book management. Also, when designing your book names, consider the feature that allows you to use a single workflow action to assign a different book to different records, by using an expression that resolves to a book name.

User Books

The disadvantage of creating custom books that replicate user books is that the data in the custom books and in the default user books must be synchronized. This additional task increases server-processing time, and affects the speed at which records are retrieved.

NOTE: One reason why a company might consider replicating user books is to give a user temporary access to another user's data. A better way of meeting this need is to add the user who wants to access the data as a delegate for the user who owns the data.

Data Access Needs

Your book structure does not have to reflect your company's corporate hierarchy. Instead, it is recommended that your book structure should closely reflect how your company organizes its data. Parts of your business can be organized by geography, while other parts can be organized by product line or industry. Pay special attention to cases where:

- Two (or more) departments must not be able access data belonging to the other department
- Two (or more) departments must be able to access data belonging to the other department

Relevance of Corporate Structure

In many companies, a parent organization has complete access to all data in the child organizations. Members of such a parent organization typically have global access to data across all child organizations.

If your organization is structured in this way, it is recommended that you do not to set up books that reflect organizational structure at the parent organization level. However, consider the following:

- Setting up books that reflect the organizational structure at other levels (such as child organization level)
- Setting up other book hierarchies at parent organization level. For example, at parent organization level, you can create a book or book hierarchy that allows users at parent organization level to view opportunities that have significant revenue potential, across all child organizations.

Data Affiliations

Examine the procedures that your company follows when a user transfers from one department to another. For example:

- If the data that the user manages always moves to the new department with the user so that there is continued affiliation of data, it is best to manage your data through record ownership and teams. Typically, appointments and tasks move with the user at all levels. In some sales environments, all customer data moves with the user. This data affiliation is true for small and medium businesses and for businesses that focus on low volume, high-value sales.
- If the data usually stays in a fixed organization, such as a geographical organization, so that there is organizational ownership of data, it is best to manage the data through books that reflect the organizational structure.
- If both continued affiliation and organizational ownership continue to exist for some time after the user moves to another department, the two hierarchies can coexist.

User Needs and Tasks

When designing your book structure, consider the task where users most commonly use books, including working through lists, searching for records, and creating and using reports.

Working Through Lists

To help you to identify the lists that users need, determine the types of lists that are most frequently used, and the ideal lists for your users. Ask the users in your company for input to help you to do this. If no book in your book structure contains all the necessary records for an ideal list, the book structure is probably missing a hierarchy. For example, you can set up both a geographic hierarchy and a product-oriented hierarchy.

If users spend a lot of time working in a specific subset of one book, create a subbook for the subset. Name the subbook in a way that allows users to recognize it. The subbook can also be set as the default for the Book selector, so that users do not have to select the appropriate book every time. For more information about setting the default for the Book selector, see Enabling Books for Users and User Roles (on page 1451).

Searching for Records

To determine the search needs of the users in your company, ask the users about scenarios where they look up particular records. Your book structure and book sizes should reflect the searches and search criteria that users perform most frequently.

NOTE: If you already have a book structure in place, and are further refining it, ask users if they can typically identify that a particular record is part of a particular book in the hierarchy. If the users consistently say that they can be certain only about a book at a higher level, ask them if another subdivision of the book structure would allow them to narrow their search further. Users should be forced to search higher-level books only as an exception to their normal searches.

The fields that are used in a search also affect the speed of the search:

- Using indexed fields to search for records in books results in optimal performance. (Indexed fields are shown in green text in the search sections.)
- When nonindexed fields (rather than indexed fields) are used to search for records in books, searches are slower, and performance is affected by the volume of records that are searched. (Search fields that are not indexed are shown in black text in the search sections.)

For example, if you determine that users typically search contact records based on indexed fields, the number of records for the lowest-level book (called the leaf-node book) might be up to 100,000 for each record type. However, if users typically search contact records based on nonindexed fields, you can restrict the size of your leaf-node books to between 20,000 and 30,000 records for each record type.

Data configuration varies from company to company. As a result, there is no recommended number of records for books. You must manage book size continuously. Books facilitate faster searches by reducing the number of records that are searched.

Creating and Using Reports

All users except administrators are subject to data-visibility rules for reports. When a user book or custom book is specified in the Book selector for reporting, the data considered for the reports is as follows:

- All content in historical analyses (including historical analyses accessed from the Analytics tab, and reports embedded in record Homepages) is restricted to the book and includes all sublevels of the selected book. Records that the user owns, or where the user is a member of a team, are not included unless those records are also in the selected book or one of its subbooks.
- Real-time reporting is restricted to data directly associated with the book (custom book or user book) selected in the Book selector. If the selected book has subbooks or subordinates, the data in the subbooks or subordinates is ignored in real-time reports.

NOTE: Although you do not typically need to change your book structure after you set it up, you can do so. No downtime is required to make such changes, and the changes are applied immediately. However, the changes are not immediately reflected in the data in real-time reports.

For more information about visibility to records in reports, see About Visibility to Records in Analytics (on page 807).

Manager Visibility

When you are designing your book hierarchies, base your designs on the following principles:

- The functionality provided by the Manager Visibility Enabled check box on the company profile is used as little as possible.

- The Include Sub-Items option is seldom or never used in searches of large data volumes. (The number of records that constitutes a large data volume differs from company to company and according to search patterns.)

  There are cases where it is necessary to use the Include Sub-Items option. For example, managers need to run lists on user books that include their subordinates, because their subordinates cannot share data with each other. If the volumes are large, then the search time increases. However, for optimal performance, select the Include Sub-Items option only when necessary.

Hierarchy Levels

Book hierarchies that have large numbers of levels, with records at every level, behave in a similar way to the team functionality where manager visibility is enabled. Such hierarchies perform well with small data sets. However, as data volumes grow, books with fewer levels in the hierarchy (or with no hierarchy levels) perform far better than team functionality.

If one level of your book hierarchy provides no additional value to data security or data organization, merge the redundant book and its subbooks. Ask book users if they can typically identify whether a record is in one subbook or another subbook of the same parent book; if they cannot, it indicates that the best option is to collapse the two subbooks into the parent book.

A simple method of reducing the number of levels in a book hierarchy is to prefix subbooks with the name of the parent book. For example, if you have a subbook called North with a parent book called North America, remove the parent book, and rename the subbook as NA – North.

Cross-Listing

Cross-listing is the practice of duplicating records across multiple books. Cross-listing has an administrative overhead for users, because synchronization is required, resulting in many read-write operations that affect the server's performance. Keep cross-listing to a minimum.

Automated Book Management

Typically, book assignment criteria are mapped to one or more fields in a record type. You can create workflow rules to automatically reorganize the book assignment when one of those fields changes.

For example, if you have a book hierarchy called *Territory,* you can create a workflow rule to monitor a field in a record type (for example, the Territory field on accounts), and then create an Assign a Book action on the rule to update the Territory book on the record with a new book when the Territory field value on the account changes.

When you design your book names, consider whether you want to use Assign a Book workflow actions in such a way that a single workflow action can assign a different book to different records, based on an expression that resolves to a book name.

For example, assume that you have accounts in North America, and you also have accounts based in EMEA. You might want to set up two separate books for the different locations, and assign the appropriate book to an account depending on the location of the account. To set up this configuration, you can create two books, one named North America and the other named EMEA. You can then create a custom picklist field called Sales Location, with the values North America and EMEA, and add the custom field to the page layout for the Account record type for the appropriate roles. Then, you can create an Assign a Book workflow action that does the following when an account record is updated:

- Evaluates an expression to determine the value that is selected in the Sales Location field on the account record.
- Associates the account record with the book whose name matches the value returned by the expression.

Related Topics

See the following topic for related information:

- Creating Workflow Actions: Assign a Book (on page 1529)

About Web Services Support for Books

Books can be managed through Web services. When books are enabled for your company, the Book Web services description language (WSDL) is available for download. For more information about Web services, see *Oracle Web Services On Demand Guide*.

About Record Ownership Modes

Depending on your company's business needs, you might not want to assign owners to records of a certain record type. Instead, you might want to organize your records in such a way that you do not need to reassign ownership of records when employees move to other responsibilities, or when sales teams are realigned because business models change. Starting with Release 20, Oracle CRM On Demand allows you to support such business needs by associating a primary custom book with a record instead of assigning an owner to the record. Any user who is a member of the primary custom book on a record can access and work with that record, as long as the user's role and access profile settings give the user the necessary access rights. Your company might also want to set up some record types so that records of that type are not required to have either an assigned owner or an associated primary custom book.

Oracle CRM On Demand allows you to set up the following modes of record ownership for most of the record types that use books:

- **User mode.** User mode is similar to record ownership in Release 19 and earlier releases of Oracle CRM On Demand. When a record type is configured in user mode, each record of that record type must have an owner assigned to it. If the Book field is available on the detail page of the record, then the Book field displays the user book associated with the owner.

  NOTE: Service request records can exist without an owner by default, and some record types such as Users and Products do not have owners on the records. This functionality is unchanged from earlier releases of Oracle CRM On Demand.

- **Book mode.** When a record type is configured in book mode, the records of that record type cannot have an owner assigned to them. Instead, a primary custom book is required for each record. Any user who is a member of the primary book on a record has access to and can work with the record, as long as the user's role and access profile settings give the user the necessary access rights. You can use book mode only with record types that support books.
- **Mixed mode.** Mixed mode is also referred to as *user or book mode*. When a record type is configured in this mode, a record of that record type can be set up in any one of the following ways:
  - The record can exist without either an assigned owner or an associated primary custom book. Users can access such a record through team membership or membership of a book associated with the record. Users whose user role has the Can Read All Records check box selected in Step 2 of the Role Management wizard can also access the record.
  - The record can have an owner assigned to it.
  - The record can have a primary custom book associated with it.

  NOTE: The record cannot have both an assigned owner and a primary custom book.

  You can use mixed mode only with record types that support books.

NOTE: You must use the user mode of record ownership for the Sample Transaction record type, because every sample transaction must be related to an inventory period for a specific user. Do not configure book mode or mixed mode for the Sample Transaction record type.

Regardless of the ownership mode that you configure for a record type, users can assign additional books to a record, and users can link additional users to a record if the record type supports teams. A user who is a member of any book that is assigned to a record can access the record and can work with the record, as long as the user's role and access profile settings give the user the necessary access rights.

Reporting

For the Account and Contact record types, you can create real-time and historical reports based on the relationship between the records and the primary book on the records. For more information about reporting and record ownership modes, see About Visibility to Records in Analytics (on page 807).

Record ownership modes do not impact the data-visibility rules that apply when you select a book in the Book selector in Analytics. For more information about the data-visibility rules for books in reporting, see About Designing Book Structures (on page 1424).

Record Types That Support Record Ownership Modes

Record ownership modes are supported for record types that support custom books, with the following exceptions:

- Allocation
- Fund
- Inventory Audit Report
- Inventory Period
- Messaging Plan
- Smart Call
- Solution

You can configure all of the other record types that support custom books in user mode, book mode, or mixed mode. You can use a mixture of ownership modes for the various record types that support books. For example, you can configure the Contact record type in book mode, and configure the Account record type in user mode. You can change the record ownership mode for a record type at any time. You configure the record ownership mode for a record type by configuring the Owner and Book fields on the record type as required or not required, as shown in the following table.

NOTE: The page layouts for the record type must be set up correctly for the record ownership mode. For more information, see About Field Setup and Page Layouts for Record Ownership Modes (on page 1207).

Record Ownership Mode	Owner Field Set to Required	Book Field Set to Required	Other Configuration Details	Comments
User Mode	Yes	No	None	If the Book field is present on a record layout, then the field is read-only and shows the name of the user book for the user who is the assigned owner of the record.
Book Mode	No	Yes	(Optional) Set the Owner field to Read-Only.	If the Owner field is present on a record layout, then the field must be blank. The Book field is a picklist field that contains a list of the custom books you set up for your company.

Record Ownership Mode	Owner Field Set to Required	Book Field Set to Required	Other Configuration Details	Comments
Mixed Mode	No	No	None	If a custom book is selected in the Book field on a record, then the Owner field is blank. If a user is selected in the Owner field, then the Book field is automatically set to the name of the user book for the owner.

Default Record Ownership Mode

For existing companies that were created in Release 19 or earlier releases of Oracle CRM On Demand, user mode is the default record ownership mode except for the Service Request record type, which is configured in mixed mode by default. For new companies, mixed mode is the default record ownership mode for the record types that support record ownership modes.

Default Values in Owner and Book Fields

When a user opens a New record page, the values in the Owner and Book fields are as follows:

- If the record type is configured in user mode, then the Owner field is automatically populated with the alias of the current user. The Book field, if it is present, is automatically populated with the name of the user book for the current user.
- If the record type is configured in mixed mode, then neither the Owner field nor the Book field is populated.

  NOTE: Appointments that users create through their calendar are an exception to the normal behavior for record ownership modes. When a user creates an appointment through the user's calendar, the Owner field is populated with the name of the current user, regardless of the record ownership mode.

- If the record type is configured in book mode, then the following happens:
  - The Owner field on the new record is not populated.
  - For the Book field, the default value depends on the default book that is specified for the record type on the current user's user record, as follows:
    - If a custom book is specified as the default book for the record type, then the Book field on the new record is automatically populated with the name of the specified default book.
    - If a default book is not specified for the record type, or if a user book or the All book is specified as the default book for the record type, then the Book field is not populated on the new record.

    For information about setting up default books by record type for a user, see Setting Up Default Books by Record Type for a User (on page 1377).

NOTE: If the Owner field is required on a page layout, and if the record type is in mixed mode, then the Owner field is blank by default when a user opens a New record page that uses that page layout. For more information about the field setup and page layouts for record ownership modes, see About Field Setup and Page Layouts for Record Ownership Modes (on page 1207).

Considerations for Record Ownership Modes

When configuring the record ownership mode for a record type, consider the following:

- **Assignment manager.** The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. If there is a primary custom book assigned to the record before the assignment manager reassigns the record to an owner, then the assignment manager removes the primary book from the record. The assignment manager cannot reassign records if the record type is configured in book mode. If you configure a record type in book mode, then it is strongly recommended that you make all rule groups for that record type inactive. For more information about assignment rules, see About Assignment Rules (on page 1562).

- **Working with other applications.** The following applications require records to have an owner. You cannot use these applications if the record type that the application works with is configured in book mode, and if the record type is configured in mixed mode, then the records must have owners:
  - Oracle Outlook Email Integration On Demand
  - Oracle Notes Email Integration On Demand
  - Oracle CRM On Demand Integration for Office
  - Oracle CRM On Demand Connected Mobile Sales
- **Updating records after changing ownership mode.** If you change the record ownership mode for a record type to user mode, consider updating all of the records of that type to have an owner. Otherwise, the user who next updates a record of that record type will be forced to select an owner for the record. Similarly, if you change the record ownership mode for a record type to book mode, consider updating all of the records of that type to have an appropriate primary custom book assigned to them. Otherwise, the user who next updates a record of that record type will be forced to select a primary custom book for the record.

What Happens When You Change the Record Ownership Mode for a Record Type?

If your company changes the record ownership mode for a record type from one mode to another mode, then the new ownership mode is enforced for any new records of that record type. For existing records, the behavior is as follows:

- **When the new record ownership mode is user mode.** The following happens when a record is updated for the first time after the ownership mode changes:
  - If the record does not already have a user assigned as the owner, then the user who updates the record is required to select a user in the Owner field.
  - If the record previously had a primary custom book associated with it, then the name of the primary book is cleared from the Book field, and the name of the user book for the new owner is shown in the Book field. The book is also removed from the record and no longer appears in the Books section of the record Detail page.
- **When the new record ownership mode is book mode.** The following happens when a record is updated for the first time after the ownership mode is changed:
  - If the record does not already have a primary book associated with it, then the user who updates the record is required to select a primary custom book in the Book field.
  - If the record previously had an assigned owner, then the following happens:
    - The Owner field is cleared on the record.
    - If the record type supports teams, then all of the members of the team, except the former owner of the record, remain as members of the team. The behavior is the same for team members who are members of a predefined group; that is, all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a predefined group, then all of the members of the group are removed from the team. Any team members who are not members of the predefined group remain as members of the team, as is the case with other record types.

  NOTE: In the standard application, the former owner of the record is not retained as a member of the team, as described here. However, your administrator can configure the record type so that the former owner of the record is retained as a member of the team on the record. For information about configuring a record type to retain the former owner as a member of the team, see Customizing Previous Ownership for Shared Records (see Customizing Previous Ownership for Shared Records on page 1355).

- **When the new record ownership mode is mixed mode.** The following happens when a record is updated for the first time after the ownership mode is changed. This behavior also applies each time the record is updated while the record type is in mixed mode:
  - The user who updates the record is not required to select an owner or primary book.
  - The user who updates the record can select an owner or a primary custom book for the record but not both.
  - If a user assigns an owner to a record, and a primary custom book was previously associated with the record, then the Book field is cleared on the record. The book is also removed from the record and no longer appears in the Books section of the record Detail page.
  - If a user associates a custom book as a primary book on the record, and the record previously had an assigned owner, then the following happens:
    - The Owner field is cleared on the record.
    - If the record type supports teams, then all of the members of the team, except the former owner of the record, remain as members of the team. The behavior is the same for team members who are members of a predefined group; that is, all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a predefined group, then all of the members of the group are removed from the record. Any team members who are not members of the predefined group remain as members of the team, as is the case with other record types.

What Happens If Records Are Updated Through The Mass Update Functionality?

The Mass Update functionality, which is supported for certain record types only, allows users to update fields in group of records from list pages. When a user uses the Mass Update functionality to update a group of records, the user is not forced to provide values for any required fields that are null on the records. Therefore, if a user updates a group of records after the record ownership mode for the record type is changed, then the user is not forced to select an owner or a primary custom book on the records that the user updates, even if the new record ownership mode requires the records to have an owner or a primary custom book.

Record Ownership Modes and Automatically Generated Tasks

Record ownership modes affect the ownership of the tasks that are generated automatically by Oracle CRM On Demand, such as the tasks that are generated by the Create Task actions in workflow rules and the tasks that are generated by the sales stages in sales processes.

Considerations for Generated Tasks

When generating tasks, Oracle CRM On Demand considers the following:

- The option selected in the Owner field of the workflow action or sales stage task
- The values in the Owner and Book field of the source record if any values are present in those fields

  NOTE: The source record for a sales stage task is the opportunity from which the sales process is accessed, or in some cases, the account that is linked to the opportunity. The source record for a workflow action is the record that triggers the workflow rule.

- The record ownership mode of the Activity record type

How Oracle CRM On Demand Assigns Owners and Primary Custom Books to Generated Tasks

Oracle CRM On Demand can assign either an owner or a primary custom book to an automatically generated task, but not both. Oracle CRM On Demand can assign one of the following as the owner for an automatically generated task:

- One of the following users:
  - The owner of a source record

- The manager of the owner of a source record
- A user who has a team role or a team user role

  NOTE: *Team roles* are the roles that describe the parts that users perform within a team on a record. *Team user roles* are the Oracle CRM On Demand roles that are assigned to all users in Oracle CRM On Demand, including the users who are members of teams on records. Each member of a team on a source record can have a team role as well as a team user role.

- For tasks generated by a workflow action, the owner specified in the workflow action

Oracle CRM On Demand can assign one of the following as the primary custom book for an automatically generated task:

- The primary custom book associated with a source record
- The default custom book for one of the following:
  - The owner of a source record
  - The manager of the owner of a source record
  - A user who has a team role or a team user role

  The user's *default book* for the task is determined as follows:

  - If a default custom book that can contain data is associated with the Activity record type in the user's record, then that book is the default book.

    NOTE: The default books for record types are specified in the Default Book by Record Type section of the User Detail page.

  - If the default book for the Activity record type in the user's record is not specified, and a default custom book that can contain data is specified in the Default Book field on the user's record, then the book specified in the Default Book field on the user's record is the default book.

  NOTE: The default book must be a custom book. Oracle CRM On Demand cannot assign a user book as the primary book for a task. In addition, the default custom book must be a book that can contain data.

If an appropriate owner or primary custom book that can contain data cannot be identified, then Oracle CRM On Demand does not generate the task. The following table shows how Oracle CRM On Demand determines which owner or primary custom book to assign to a generated task.

Owner Option in Workflow Action or Sales Stage Task	Source Record: Owner or Primary Custom Book	Activity Record Type: User Mode	Activity Record Type: Book Mode	Activity Record Type: Mixed Mode
Source record owner	Owner	The owner of the source record is the owner of the task.	If the owner of the source record has a default book, then Oracle CRM On Demand assigns that book as the primary book for the task. If the owner of the source record does not have a default book, then the task is not created. No error message is returned.	The owner of the source record is the owner of the task.

<table>
<tr><th>Owner Option in Workflow Action or Sales Stage Task</th><th>Source Record: Owner or Primary Custom Book</th><th>Activity Record Type: User Mode</th><th>Activity Record Type: Book Mode</th><th>Activity Record Type: Mixed Mode</th></tr>
<tr><td>Source record owner</td><td>Primary custom book</td><td>The task is not created. No error message is returned.</td><td>The primary custom book from the source record is assigned as the primary book for the task.</td><td>The primary custom book from the source record is assigned as the primary book for the task.</td></tr>
<tr><td>Source record owner</td><td>No owner and no primary custom book</td><td>The task is not created. No error message is returned.</td><td>The task is not created. No error message is returned.</td><td>The task is not created. No error message is returned.</td></tr>
<tr><td>Manager of source record owner</td><td>Owner</td><td>If the owner of the source record has a manager, then the manager is the owner of the task.

If the owner of the source record has no manager, then the behavior is as follows:
For sales processes, the owner of the source record is the owner of the task.
For workflow actions, the task is not created and no error message is returned.</td><td>For information about the behavior in this case, see the second table in this topic.</td><td>If the owner of the source record has a manager, then the manager is the owner of the task.

If the owner of the source record has no manager, then the behavior is as follows:
For sales processes, the owner of the source record is the owner of the task.
For workflow actions, the task is not created and no error message is returned.</td></tr>
<tr><td>Manager of source record owner</td><td>Primary custom book</td><td>The task is not created. No error message is returned.</td><td>The task is not created. No error message is returned.</td><td>The task is not created. No error message is returned.</td></tr>
<tr><td>Manager of source record owner</td><td>No owner and no primary custom book</td><td>The task is not created. No error message is returned.</td><td>The task is not created. No error message is returned.</td><td>The task is not created. No error message is returned.</td></tr>
</table>

Owner Option in Workflow Action or Sales Stage Task	Source Record: Owner or Primary Custom Book	Activity Record Type: User Mode	Activity Record Type: Book Mode	Activity Record Type: Mixed Mode
Team role or team user role	One or more team members have the role	The team member is the owner of the task. A task is generated for each team member who has the specified role.	If the team member has a default book, then Oracle CRM On Demand assigns that book as the primary book for the task. If the team member does not have a default book, then the task is not created. No error message is returned.	The team member is the owner of the task. A task is generated for each team member who has the specified role.
Team role or team user role	No team member has the role	For workflow actions, the task is not created and no error message is returned. For sales processes, if the source opportunity has an owner, then the opportunity owner is the owner of the task. If the source opportunity does not have an owner, then the task is not created and no error message is returned.	For workflow actions, the task is not created and no error message is returned. For sales processes, if the owner of the source opportunity has a default book, then the default book is assigned to the task. If the owner of the source opportunity does not have a default book, then the task is not created and no error message is returned.	For workflow actions, the task is not created and no error message is returned. For sales processes, if the source opportunity has an owner, then the opportunity owner is the owner of the task. If the source opportunity does not have an owner, then the task is not created and no error message is returned.
Specific user	Not applicable	The specified user is the owner of the task.	If the specified user has a default book, then Oracle CRM On Demand assigns that book as the primary book for the task. If the specified user does not have a default book, then the task is not created. No error message is returned.	The specified user is the owner of the task.

The following table shows how Oracle CRM On Demand determines which owner or primary custom book to assign to a generated task in the following circumstances:

- The option in the Owner field on the sales stage task or workflow action is set to the manager of the source record owner
- The source record has an owner

- The Activity record type is configured in book mode

Owner Has a Manager	Manager Has a Default Custom Book That Can Contain Data	Owner Has a Default Custom Book That Can Contain Data	Sales Process Behavior	Workflow Behavior
Yes	Yes	Not applicable	Oracle CRM On Demand assigns the manager's default book as the primary book for the task.	Oracle CRM On Demand assigns the manager's default book as the primary book for the task.
Yes	No	Yes	Oracle CRM On Demand assigns the default book of the source record owner as the primary book for the task.	The task is not created. No error message is returned.
No	Not applicable	Yes	Oracle CRM On Demand assigns the default book of the source record owner as the primary book for the task.	The task is not created. No error message is returned.
No	Not applicable	No	The task is not created. No error message is returned.	The task is not created. No error message is returned.

About Importing Books and Book Assignments

You can import the following book-related records to Oracle CRM On Demand:

- **Books.** For information about importing book records, see Book Fields: Import Preparation (on page 1686).
- **Book users.** You can import book user records to associate users with custom books. For information about importing book user records, see Book User Fields: Import Preparation (on page 1684).
- **Account books.** You can import account book records to assign books to accounts. For information about importing account book records, see Account Book Fields: Import Preparation (on page 1658).
- **Contact books.** You can import contact book records to assign books to contacts. For information about importing contact book records, see Contact Book Fields: Import Preparation (on page 1698).

NOTE: To import account book or contact book records, your role must include the Manage Future Books privilege.

When you import records to assign books to accounts and contacts, you can specify a start date and an end date for each book assignment. You can also use the Future Primary Flag field to specify if the book that you assign to an account or contact is to become the primary book for that account or contact when the assignment becomes active. For more information about time-based book assignments, see About Time-Based Book Assignments (on page 1437).

Related Topics

See the following topics for related information:

- Scenario for Using Books to Manage Sales Territories (on page 1439)
- Example of Using Books to Manage Sales Territories (on page 1440)

About Time-Based Book Assignments

You can manage book assignments for accounts and contacts by importing account book records and contact book records. You can specify a start date and an end date for each book assignment that you import. If you do not specify a start date for a book assignment, then the assignment becomes active immediately. You can also use the Future Primary Flag field to specify if the book that you assign to an account or contact is to become the primary book for that account or contact when the book assignment becomes active.

NOTE: To import account book or contact book records, your role must include the Manage Future Books privilege.

Updates to Account and Contact Book Assignments

A book-assignment procedure runs periodically to examine all book assignments for accounts and contacts and to update the assignments as necessary. To determine when the book-assignment procedure is scheduled to run for your instance of Oracle CRM On Demand, contact Oracle CRM On Demand Customer Care.

The book-assignment procedure updates the book assignments for accounts and contacts as follows:

- **Activates book assignments.** If the start date of a book assignment has arrived and the assignment is not already active, then the assignment becomes active. When a book assignment becomes active, users who are members of that book have access to the account or contact through membership of that book.

  For example, you might import an account book record that assigns Book A to Account 1 with a start date of January 01 next year. The book assignment for Book A on Account 1 becomes active the first time that the book-assignment procedure runs after the start of January 01 next year.
- **Determines if a book is the primary book.** If the Future Primary Flag field is set to Y for a book assignment and the assignment is being activated, then the book becomes the primary book for the account or contact.

  For example, assume that Book A is currently the primary book for Account 1. You might import an account book record that assigns Book B to Account 1 with a start date of January 01 next year and with the Future Primary Flag field set to Y. The first time that the book-assignment procedure runs after the start of January 01 next year, the book assignment for Book B for Account 1 becomes active, and Book B becomes the primary book for Account 1. Book A is no longer the primary book for Account 1. However, the book assignment for Book A for Account 1 remains active unless the end date for the assignment is in the past when the book-assignment procedure runs.
- **Resolves conflicts if more than one book is specified as the primary book.** If multiple book assignments for an account or contact have the same start date and also have the Future Primary Flag field set to Y, then the following happens when the start date for the assignments arrives:
  - All of the book assignments become active.
  - The first book assignment that becomes active becomes the primary book for the record.
  - If there is an existing primary book for the record, then that book is no longer the primary book for the record, but the book assignment remains active unless the end date for the book assignment is in the past.

  For example, assume that Book A is currently the primary book for Account 1. You might import two account book records for Account 1. One of the records assigns Book B to Account 1 and the other assigns Book C to Account 1. Both assignments have the same start date of January 01 next year, and both assignments have the Future Primary Flag field set to Y. The first time that the book-assignment procedure runs after the start of January 01 next year, the assignments for Book B and Book C for Account 1 become active, and the assignment that is processed first becomes the primary book for Account 1. Book A is no longer the primary book for Account 1. However, the book assignment for Book A for Account 1 remains active unless the end date for the assignment is in the past when the book-assignment procedure runs.

- **Deactivates book assignments and removes primary books as necessary.** If the end date of a book assignment record is in the past, then the assignment becomes inactive and the book is removed from the record. In addition, if the book was the primary book for the account or contact, then the book is no longer the primary book for the account or contact.

  For example, assume that Book A is currently the primary book for Account 1. The end date of the book assignment is December 31 this year. The first time that the book-assignment script runs after the start of January 01 next year, the book assignment becomes inactive, and Book A is removed from the position of primary book for Account 1.

  When a book assignment becomes inactive, the relationship between the book and the account or contact is ended, and the book is removed from the account or contact. Users no longer have access to the account or contact through membership of that book. However, users who have access to the account or contact through another book or through other access-control components, such as team membership, can still access the record.

You cannot change the book-assignment procedure.

Example of a Time-Based Book Assignment

As an example of a time-based book assignment, consider the following: Book A is not currently assigned to Account 1. On December 01 of this year, you import an account book record that assigns Book A to Account 1. The book assignment has a start date of Jan 01 next year and an end date of Mar 31 of the same year. The book-assignment procedure activates and deactivates the book assignment as follows:

- Before the first time that the book-assignment procedure runs after the start of January 01 next year, the assignment of Book A to Account 1 is inactive, and Book A does not appear in the Books related information section of the detail page for Account 1.
- The first time that the book-assignment procedure runs after the start of January 01 next year, the book-assignment procedure activates the book assignment. When this happens, Book A appears in the Books related information section of the detail page for Account 1.
- The first time that the book-assignment procedure runs after the end of March 31 next year, the book-assignment procedure deactivates the book assignment. When this happens, Book A no longer appears in the Books related information section of the detail page for Account 1.

Restrictions When Specifying Start and End Dates for Book Assignments

When you specify the start and end dates for book assignments, note the following restrictions:

- If you specify both a start date and an end date, then the start date must be earlier than the end date.
- If you do not specify a start date, then the assignment becomes active at the time that it is added to Oracle CRM On Demand.
- If you do not specify an end date, then the book assignment remains active unless the book is removed from the record.
- If you specify an end date and do not specify a start date, then the book assignment becomes active immediately, and it remains active until the end date is reached or the book assignment is removed from the record, whichever comes first.

For example, you might import an account book record that assigns Book A to Account 1 and that has no start date and no end date. In this case, the book assignment becomes active immediately and is never made inactive by the book-assignment procedure because the book assignment does not have an end date. However, you can remove Book A from Account 1 through the user interface.

NOTE: An account can have multiple books assigned to it at the same time, with the same or different start dates and end dates for each book assignment. Similarly, a contact can have multiple books assigned to it at the same time, with the same or different start dates and end dates for each book assignment.

You can see the start and end dates in the book assignment details in the user interface in Oracle CRM On Demand, but you cannot change these dates in the user interface.

About Updating Existing Book Assignments

If you import a record to assign a book to an account or contact, and the book is already assigned to the account or contact, then the existing book assignment record in Oracle CRM On Demand is updated with the values from the imported record. You can also overwrite an existing value in the Start Date or End Date fields by importing a blank value. For example, assume that Book A is already assigned to Account 1. The assignment has a start date in the past and an end date in the future. You can import an account book record for Book A and Account 1 that has the same start date as the existing assignment but has no end date. In this case, the existing assignment is updated and the end date is removed.

Criteria for Updating Active Book Assignments

If an existing book assignment is already active, then the active periods for the existing assignment and the record that you import must overlap or be contiguous. The start and end dates of a record that you import to update an active book assignment must meet the following criteria:

- If the existing assignment has no end date, then the start date on the record that you import must not be a future date.
- The start date on the record that you import must not be more than 7 days later than the end date of the existing assignment.

If these criteria are not met, then the existing, active book assignment is not updated.

Criteria for Updating Future Book Assignments

If you import a record to assign a book to an account or contact, and there is already a book assignment record with a start date in the future for the same book and the same account or contact, then the end date of the assignment that you import must not be more than 7 days earlier than the start date of the existing assignment record. For example, if a record already exists to assign Book A to Account 1 on Feb 01 next year, and you want to change the start date of the assignment to January 01 next year, then the end date of the record that you import must not be earlier than January 25 next year. If the end date of the assignment record that you import is January 24 or earlier, then the import of the record fails and an error message is returned to indicate that the record already exists.

Related Topics

See the following topics for related information:

- About Importing Books and Book Assignments (see About Importing Books and Book Assignments on page 1436)
- Scenario for Using Books to Manage Sales Territories (on page 1439)
- Example of Using Books to Manage Sales Territories (on page 1440)

Scenario for Using Books to Manage Sales Territories

This scenario gives one example of how your company might use custom books. In this scenario, custom books are used to manage sales territories. You might use the custom books functionality differently, depending on your business model.

Your company organizes your accounts on a geographical basis and assigns groups of sales representatives to work with the accounts in each geographical area or territory. In addition, you might want to reassign sales representatives from one territory to another for various reasons. When such reassignments happen, you must realign the relationships between sales representatives and territories. Less frequently, an account relocates from one territory to another. When such a relocation happens, you must realign the relationships between accounts and territories. An example of configuring books, users, and accounts to support this scenario is given in Example of Using Books to Manage Sales Territories (on page 1440).

Example of Using Books to Manage Sales Territories

This topic gives an example of using custom books to manage sales territories. You might use the custom books functionality differently, depending on your business model. The example in this topic supports the scenario described in Scenario for Using Books to Manage Sales Territories (on page 1439).

To use books to manage sales territories

1. Create or import the custom books that you want to represent your sales territories.

   For information about creating books, see Creating Books and Book Hierarchies (on page 1446). For information about importing books, see Book Fields: Import Preparation (on page 1686).
2. Associate your sales representatives with the appropriate territory books.

   You can associate users with books directly in Oracle CRM On Demand, or you can import book user records. For information about associating users with books, see Associating Users with Books (on page 1448). For information about importing book user records, see Book User Fields: Import Preparation (on page 1684).
3. Configure the Account record type in book mode.

   For information about configuring record ownership modes, see Configuring Record Ownership Modes (on page 1446).
4. Import the necessary account book records to assign the appropriate territory books to the accounts.

   Use the start date on each account book record to specify the date when the assignment is to come into effect, that is, the date from which you want your sales representatives to have access to the account records in their territories. If you want, you can also specify the date when each book assignment is to end.

   For more information about importing book assignment records, see the following topics:

   - Account Book Fields: Import Preparation (on page 1658)
   - About Importing Books and Book Assignments (see About Importing Books and Book Assignments on page 1436)
   - About Time-Based Book Assignments (on page 1437)

After you import the account book records and the book-assignment procedure activates the assignments on the specified start date, your sales representatives can access the records in their territories.

If sales representatives are reassigned from one territory to another, then you must realign the relationships between the sales representatives and the territories.

To realign the relationship between a sales representative and a territory

- Update the user record for the sales representative, as follows:
  - If the sales representative is assigned to a new territory, then add the territory book to the user record.
  - If the sales representative is no longer assigned to a territory, then remove the book from the user record.

  You can update the user record directly in Oracle CRM On Demand, or you can import book user records. For information about associating users with books, see Associating Users with Books (on page 1448). For information about importing book user records, see Book User Fields: Import Preparation (on page 1684).

If accounts relocate from one territory to another, then you must realign the relationships between the accounts and the territories.

To realign the relationship between an account and a territory

- Update the account record, as follows:
  - Add the new territory book to the account.
  - Remove the old territory book from the user record.

You can update the account record directly in Oracle CRM On Demand, or you can import account book records. For information about assigning records to books, see Assigning Records to Books (on page 1454). For information about importing account book records, see Account Book Fields: Import Preparation (on page 1658).

Process of Setting Up Books

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

1. Contact Oracle CRM On Demand Customer Care, and ask to have the book functionality turned on for your company.

   When Oracle CRM On Demand Customer Care turns on the book functionality for your company, several controls become available to you in Oracle CRM On Demand. For information about verifying that these controls are available, and that the Administrator role has been set up to use books, see Verifying Book Setup for the Administrator Role (on page 1441).
2. Design your book structure.

   For guidelines about designing your book structure, see About Designing Book Structures (on page 1424).
3. (Optional) Create book types and book user roles.

   For more information, see Creating Book Types and Book User Roles (on page 1445).
4. (Optional) Configure the record ownership mode for record types.

   For more information, see About Record Ownership Modes (on page 1428) and Configuring Record Ownership Modes (on page 1446).
5. Create the books and the book hierarchies.

   For more information, see Creating Books and Book Hierarchies (on page 1446).
6. Associate users with books.

   For more information, see Associating Users with Books (on page 1448).
7. Enable books for your company.

   For more information, see Enabling Books for Your Company (on page 1451).
8. Enable books for users and user roles.

   For more information, see Enabling Books for Users and User Roles (on page 1451).

Related Topics

See the following topics for related information about books and book structures:

- Book Management (on page 1421)
- About Web Services Support for Books (on page 1428)
- About Importing Books and Book Assignments (see About Importing Books and Book Assignments on page 1436)
- About Time-Based Book Assignments (on page 1437)
- Scenario for Using Books to Manage Sales Territories (on page 1439)
- Example of Using Books to Manage Sales Territories (on page 1440)
- Adding Books to Record Detail Page Layouts (on page 1453)
- Assigning Records to Books (on page 1454)
- Book Hierarchy Page (on page 1456)
- Book Fields (on page 1457)

Verifying Book Setup for the Administrator Role

To turn on the book functionality for your company, Customer Care does the following:

- Grants the Manage Books privilege and access to books to the administrator's role
- Sets up the access profile for the administrator to allow access to books

The following procedure describes how to verify that the administrator's role is set up for books.

To verify that the administrator's role is set up for books

1. Sign in to Oracle CRM On Demand as a user with the Administrator role.
2. In the upper-right corner of any page, click the Admin global link.
3. In the User Management and Access Controls section of the Admin Homepage, click the User Management and Access Controls link.
4. In the Role Management section, click the Role Management link.
5. From the Translation Language list, select your company's primary language.
6. Click the Edit link for the Administrator role.
7. In the Role Management Wizard, go to Step 2, Record Type Access, and verify that the access to book records is as shown in the following table.

   The following table shows the book record access that is required for the Administrator role.

Record Type	Has Access?	Can Create?	Can Read All Records?
Books	Selected	Selected	Selected

8. Go to Step 4, Privileges, and verify that the Manage Books privilege is selected.

   The following table describes the Manage Books privilege.

Category	Privilege	Description
Admin: Users and Access Controls	Manage Books	Manages Book access, assigns data in bulk to Books, and defines Book related workflows

   NOTE: A user whose role has the Manage Books privilege as well as the Manage Roles and Access privilege, can grant the Manage Books privilege to other user roles. As with most administration tasks, it is recommended that the privilege to manage books is granted to company administrators only.

9. Navigate back to the User Management and Access Controls page.
10. In the Access Profile Management section, click the Access Profiles link.
11. From the Translation Language drop-down list, select your company's primary language.
12. Verify that the settings for the access profiles are correct, as follows:
    a. Click the Edit link for the Administrator Default Access Profile, and verify that the settings match those shown in the following table.
    b. Click the Edit link for the Administrator Owner Access Profile, and verify that the settings match those shown in the following table.

    The following table shows the required settings that allow users with the Administrator role to manage books in Oracle CRM On Demand.

Record Type	Related Record	Administrator Default Access Profile	Administrator Owner Access Profile
Account	Books	Full	Full
Accreditation*	Books	Full	Full

Record Type	Related Record	Administrator Default Access Profile	Administrator Owner Access Profile
Activity	Books	Full	Full
Allocation*	Books	Full	Full
Application*	Books	Full	Full
Books	Not applicable	Read/Edit/Delete	Read/Edit/Delete
Books	Sub-Books	View	View
Books	User	Full	Full
Business Plan*	Books	Full	Full
Campaign	Books	Full	Full
Certification*	Books	Full	Full
Contact	Books	Full	Full
Course*	Books	Full	Full
Custom Objects	Books	Full	Full
Deal Registration*	Books	Full	Full
Dealer*	Books	Full	Full
Event*	Books	Full	Full
Exam*	Books	Full	Full
Financial Account*	Books	Full	Full
Financial Plan*	Books	Full	Full
Fund*	Books	Full	Full
Household*	Books	Full	Full
Inventory Audit Report*	Books	Full	Full
Inventory Period*	Books	Full	Full
Lead	Books	Full	Full

Record Type	Related Record	Administrator Default Access Profile	Administrator Owner Access Profile
MDF Requests*	Books	Full	Full
Messaging Plan*	Books	Full	Full
Objective*	Books	Full	Full
Opportunity	Books	Full	Full
Partner*	Books	Full	Full
Policy*	Books	Full	Full
Portfolio*	Books	Full	Full
Program*	Books	Full	Full
Sample Lot*	Books	Full	Full
Sample Transaction*	Books	Full	Full
Service Request	Books	Full	Full
Smart Call*	Books	Full	Full
Solution	Books	Full	Full
Vehicle*	Books	Full	Full

NOTE: Record types marked with an asterisk (*) are not available in the standard edition of Oracle CRM On Demand. The access settings for these record types are relevant only if the record types are available.

The following table describes the controls that are enabled by the Manage Books privilege. You can access each component to verify that all of the necessary controls are available to you.

Component	Controls Enabled by the Manage Books Privilege
Admin Homepage	■ In the User Management and Access Controls section, the Book Management link is available. From this link, you can access the Book Hierarchy page, where you can create, update, and manage books. ■ In the Data Management Tools section, the Batch Assign Request Queue link is available. From this link, you can access the Batch Assign Request Queue page, where details of active and completed requests for batch book assignments are displayed.
Application Customization page	■ In the Record Type Setup section, the Book link is available. From this link, you can access the Book Application Customization page, where you can set up book fields and book user fields, including the picklist values for the Book Type and Book User Role fields.

Component	Controls Enabled by the Manage Books Privilege
Role Management Wizard	■ In Step 2, Record Type Access, the Book option appears as a line item. ■ In Step 4, Privileges, the Manage Books privilege appears as an option.

Access Profile Wizard	■ In Step 1, Access Profile Name, the Grantable to Book Users check box appears.
	■ In Step 2, Specify Access Levels:
	  ■ The Book option appears as a top-level object.
	  ■ A line item for the Book related information section appears under the Related Information link for record types that support books.

Company Profile Page	■ In the Company Data Visibility Settings section of the page, the Enable Books check box appears.
Page Layout Wizard (Layout Management)	■ In Step 4, Related Information, the Book related information section appears in the Available section of the page for all record types that support books.
Rename Record Types Page	■ The Book option appears as one of the items on the page.
Workflow	■ The Assign a Book action appears as an available option (if your role has the Manage Data Rules - Manage Workflow Rules privilege enabled).
Menu on List page	■ Batch Assign Book appears as one of the menu options for supported record types.

Creating Book Types and Book User Roles

To help you to organize your book structure, you can create book types, and then assign a type to each book that you create. For example, if you plan to have a book hierarchy for territories, you can create a book type called Territory. The Book Type field is an editable picklist field that you can customize to meet your company's needs.

You can also create book user roles that you can assign to users when you associate them with books. Book user roles are not the same as Oracle CRM On Demand user roles. For example, you can create book user roles, such as Territory User and Territory Manager, to be assigned to users who work with the territories book hierarchy.

The following procedure describes how to create book types and book user roles.

To create book types and book user roles

1. In the upper-right corner of any page, click the Admin global link.
2. Click the Application Customization link.
3. In the Record Types Setup section, click Book.
4. In the Book Application Customization page, do one of the following:
   - To create book types, click Book Field Setup.
   - To create book user roles, click Book Users Field Setup.
5. Click the Edit Picklist link for the field.
6. Enter the values for the picklist, and save your changes.

For more information about editing picklist fields, see Changing Picklist Values (on page 1254).

Configuring Record Ownership Modes

Oracle CRM On Demand allows you to set up the following modes of record ownership to support your business needs:

- User mode
- Book mode
- Mixed mode

For more information about the modes of record ownership, see About Record Ownership Modes (on page 1428).

To configure record ownership mode

1 In the upper-right corner of any page, click the Admin global link.
2 In the Application Customization section, click the Application Customization link.
3 In the Record Types Setup section, click the link for the record type that you want to configure.
4 In the Field Management section, click *record type* Field Setup, where *record type* is the name of the record type that you want to configure.
5 Depending on the record ownership mode that you want to configure, edit the fields as follows:
   - To configure the record type in user mode, configure the Owner field so that it is a required field, and then configure the Book field so that it is not a required field.
   - To configure the record type in book mode, configure the Book field so that it is a required field, and then configure the Owner field so that it is not a required field.
   - To configure the record type in mixed mode, configure both the Owner field and the Book field so that they are not required fields.
6 Save your changes.

For more information about editing fields, see Creating and Editing Fields (on page 1219).

NOTE: After you configure the record ownership mode, you must make sure that the page layouts for the record type are set up correctly for the record ownership mode. For more information about page layouts for record ownership modes, see About Field Setup and Page Layouts for Record Ownership Modes (on page 1207).

Creating Books and Book Hierarchies

You create books from the User Management and Access Controls section of the Admin Homepage.

NOTE: You can also create books by importing book records. For more information, see Book Fields: Import Preparation (on page 1686).

Before you begin:

- To perform this procedure, you must have the Manage Books privilege in your user role.
- Before you start to create your books and book hierarchies, read the topic About Designing Book Structures (on page 1424).

NOTE: Oracle CRM On Demand generates audit records of all changes to books. If your user role includes the Access Master Audit Trail and Admin Configuration Audit privilege, then you can view the audit trail of the changes to books. For more information about viewing the audit trail, see Reviewing the Audit Trail for Administration Configuration Changes (on page 1177).

The following procedure describes how to create a book.

To create a book

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

2 In the User Management and Access Controls section of the Admin Homepage, click the Book Management link.

3 On the Book Hierarchy page, click New.

4 On the Book Edit page, enter the required information, and then save your record.

The following table describes the information you must enter for the book.

Field	Description
Book Name	For display purposes in the Book selector, the recommended maximum length of a book name is 60 characters.
Book Type	(Optional) Select the book type from the picklist.
Parent Book	■ If this is a root book, leave this field blank. ■ If this is a subbook, click the Lookup icon next to the Parent Book field, and select the parent book.
Can Contain Data	Applies only to the current book, not to any subbooks. Select this check box if records will be associated with this book. For performance reasons, apply this feature only to books that contain data. **NOTE:** In the Book selector, which appears throughout Oracle CRM On Demand, custom books containing data are identified by a blue document icon. Custom books that cannot contain data are identified by a yellow folder icon.

Creating Subbooks

If you want to create subbooks for an existing parent book, you can create the subbooks using the method in the previous procedure, or you can create subbooks as described in the following procedure.

To create subbooks for an existing book

1 On the Book Hierarchy page, click the link for the parent book.

2 On the Book Details page, click New in the Sub-Books title bar.

3 On the Book Edit page, enter the information for the book, and save your changes.

Moving a Book to a New Parent Book

You can change a book to make it a subbook of another book, or you can move a subbook from one parent book to another. When you change the parent of a book, the book hierarchy changes as follows:

- The new parent applies to the current book and any subbooks that are children of the current book.
- Any users assigned to the old parent book lose access to the current book and its subbooks.
- Any users assigned to the new parent book gain access to the current book and its subbooks.
- Any users assigned directly to the current book are unaffected by the change in the parent book.

NOTE: If you want to delete a parent book, you must first remove all its subbooks, users, and data. After you delete a book, the book is stored for 30 days in the Deleted Items area. During that time, you can restore the book. However, after 30 days, the book is permanently purged, and you cannot retrieve it. For information on deleting and restoring records, see Deleting and Restoring Records (on page 173).

TIP: To find out how many records a specific book contains, create a historical report for each record type. For information about creating reports, see Working with the Analytics Homepage (see Working with the Analytics Homepage on page 789).

The following procedure describes how to move a book to a new parent book.

To move a book to a new parent book

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section of the Admin Homepage, click the Book Management link.
3. On the Book Hierarchy page, click the Edit link for the book that you want to change.
4. Click the Lookup icon next to the Parent Book field, and select the new parent book.
5. Save your changes.

Associating Users with Books

You can define which users can access a book, and the level of access that each user has to records in the book. When you associate a user with a book, you specify the access profile for the user when working in the book. The following standard options are available:

- **Edit.** Allows the user to read and update the records in the book.
- **Full.** Allows the user to read, edit, and delete the records in the book.
- **ReadOnly.** Allows the user to view the records in the book.

You can also create custom access profiles for books. The Access Profiles picklist on the Book Users Edit page includes all access profiles that have the Grantable to Book Users option selected on them. For information on how to create custom access profiles for books, see Creating Access Profiles for Books (on page 1450).

The level of access that a user has to books affects the user's overall access rights to records. The following examples show how the user's access rights are determined.

Example 1

Ryan Taylor, a sales representative, has the following setup in Oracle CRM On Demand:

- Has access to account records through the sales representative role.
- Has the access level on his owner access profile set to ReadOnly for the account record type
- Has the access level on his default access profile set to ReadOnly for the account record type
- Is not a member of the account team for the ABC Widgets account
- Is associated with the Widget Makers book, with his access profile for the book set to Full

If the ABC Widgets account is in the Widget Makers book, Ryan's access rights to the ABC Widgets record allow him to read, edit, and delete the record. He has these access rights, because the access control system in Oracle CRM On Demand calculates the most liberal rights from all of the relevant access profiles and applies them. In this case, the access profile for the book is set to Full, and therefore supersedes the access profile for account records.

Example 2

Tanya Lee, a sales representative has the following setup in Oracle CRM On Demand:

- Has access to opportunity records through the sales representative role.
- Has the access level on her owner access profile set to ReadOnly for the opportunity record type
- Has the access level on her default access profile set to ReadOnly for the opportunity record type
- Is a member of the opportunity team with the Opportunity Access field set to Edit
- Is associated with the Widget Makers book, with her access profile for the book set to Full

If an opportunity is in the Widget Makers book, Tanya's access rights allow her to read, edit, and delete the record. However, if an opportunity is not in the Widget Makers book, Tanya's access rights (from her owner access profile, her default access profile, and her membership of the opportunity team) allow her to read and edit the opportunity, but she cannot delete the opportunity.

Methods of Associating Users with Books

You can use three methods to associate users with books:

- From a book record, you can associate multiple users with the book.
- From a user record, you can associate multiple books with the user.
- You can import book user records. For more information, see Book User Fields: Import Preparation (on page 1684).

The following procedure describes how to associate multiple users with a book through the book record.

To associate multiple users with a book

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the Book Management link.
3. On the Book Hierarchy page, click the name link of the book with which you want to associate users.
4. On the Book Details page, on the title bar of the Book Users section, click Add Users.
5. In the Book Users Edit page, pick the users whom you want to associate with the book.

   The following table describes the information that you must specify for each user you associate with the book.

Field	Description
Users	Click the Lookup icon next to the User field and then select the user. **NOTE:** A user's delegates do not automatically get access to a user's book. You must also associate each delegate with the book.
Book User Role	(Optional) Select the role from the picklist. **NOTE:** The book user role is not an Oracle CRM On Demand role. For information about creating book user roles, see Creating Book Types and Book User Roles (on page 1445).
Access Profile	From the list of profiles that are enabled for books, select the access profile that determines the user's access rights to the current book and any subbooks. The standard options are: - **Edit.** Allows the user to read and update the records in the book. - **Full.** Allows the user to read, edit, and delete the records in the book. - **ReadOnly.** Allows the user to view the records in the book. **NOTE:** For information about creating custom access profiles for books, see Creating Access Profiles for Books (on page 1450).

The following procedure describes how to associate multiple books with a user through the user record.

To associate multiple books with a user

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the User and Group Management section, click the User Management link.
4. In the User List, click the last name of the user with whom you want to associate books.

5 On the User Detail page, on the title bar of the Assigned Books section, click Add Books.

NOTE: If the Assigned Books section is not available on the User Detail page, click the Edit Layout link, and add the section to the page layout.

6 On the Assigned Books Edit page, pick the books that you want to associate with the user, and specify the user information for each book.

The following table describes the information that you must specify for each book that you associate with the user.

Field	Description
Book Name	Click the icon to the right of the Book Name field, pick a book in the Book selector, and click OK.
Book User Role	(Optional) Select the role from the picklist. **NOTE:** The book user role is not an Oracle CRM On Demand role. For information about creating book user roles, see Creating Book Types and Book User Roles (on page 1445).
Access Profile	From the list of profiles that is enabled for books, select the access profile that determines the user's access rights to the current book and any subbooks. The standard options are: - **Edit.** Allows the user to read and update the records in the book. - **Full.** Allows the user to read, edit, and delete the records in the book. - **ReadOnly.** Allows the user to view the records in the book. **NOTE:** For information about creating custom access profiles for books, see Creating Access Profiles for Books (on page 1450).

NOTE: Associating a user with a book does not allow the user to access the book. To allow users to access books, you must enable books for each user, and each user role that wants access to books, as described in Enabling Books for Users and User Roles (on page 1451).

Creating Access Profiles for Books

When you associate a user with a book, you select an access profile that determines the user's access rights to records in the book and in any subbooks. The access profile for the book is evaluated with all of the other access profiles for the user, and the user is given the most liberal access rights to a record that the access profiles permit. For more information about how the access profiles interact, see Associating Users with Books (on page 1448).

The standard access profiles available for selection when associating a user with a book are as follows:

- **Edit.** Allows the user to read and update the records in the book.
- **Full.** Allows the user to read, edit, and delete the records in the book.
- **ReadOnly.** Allows the user to view the records in the book.

You can also create custom access profiles for books. The Access Profiles picklist, which appears on the Book Users Edit page and on the Assigned Books Edit page, includes all access profiles that have the Grantable to Book Users option selected.

The following procedure describes how to create an access profile for books.

To create an access profile for books

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the Access Profile Management section, click the Access Profiles link.
4. Create a new access profile, or edit an existing access profile.
5. In Step 1 of the Access Profile wizard, select the Grantable to Book Users check box.
6. In Step 2, Specify Access Levels, specify the levels of access for each record type and for the related information types.
7. When you finish creating or editing the Access Profile, click Finish to save your changes.

Enabling Books for Your Company

When you have set up your book structures, you can enable books for your company. The following procedure describes how to enable books for your company.

To enable books for your company

1. In the upper-right corner of any page, click the Admin global link.
2. In the Company Administration section, click the Company Administration link.
3. In the Company Profile section, click the Company Profile link.
4. On the Company Profile page, set the following options. For more information about these options, see Setting Up Your Company Profile and Global Defaults (on page 1123).
   a. In the Company Settings section, ensure that the Global Search Method is set to Targeted Search. When Targeted Search is selected, the Book selector appears in the search section of the Action bar.
   b. In the Analytics Visibility Setting section, set the Historical Subject Areas option to Full Visibility. (This setting ensures that the data in books is synchronized with the data in the database that supports reports and dashboards.)
   c. In the Company Data Visibility Settings section, ensure that the following check boxes are selected:

Setting	Purpose
Enable Books	Use this field to control whether the Book selector displays custom books and user books. If the Enable Books check box is deselected, the Book selector displays only user books and books for delegates if delegates exist. **NOTE**: To see the Enable Books option in the Company Profile page, you must have the Manage Books privilege in your user role. **CAUTION:** You cannot deselect this check box after it has been selected. However, you can make changes to your book hierarchy after the option has been selected.
Display Book Selector	Enables the Book selector that users can use to filter records by user, delegate, or custom book.

Enabling Books for Users and User Roles

To enable a user to use books, you configure the user's role and the default access profile for the user's role. You also configure the user record for each user.

The following procedure describes how to enable books for a user role. You must perform these steps for each role that uses books.

To enable books for a user role

1. In the upper-right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the Role Management section, click the Role Management link.
4. From the Translation Language list, select your company's primary language.
5. Click the link for the role that you want to modify.
6. In the Role Management Wizard, go to Step 2, Record Type Access, and configure the access levels for the Books record type.

   The following table shows the settings you must configure to allow users (who are not administrators) to access books.

Record Type	Has Access?	Can Create?	Can Read All Records?
Books	Selected	Deselected	Deselected

   NOTE: You must ensure that the Can Read All Records check box is deselected. Otherwise, the user can access all books in the Book Hierarchy list page.

7. Click Finish to save your changes.
8. Navigate to the User Management and Access Controls page.
9. In the Access Profile Management section, click Access Profiles.
10. From the Translation Language list, select your company's primary language.
11. Click the Edit link for the Default Access Profile that is used for the user role you are enabling for books, and configure the settings to provide access to books and related record types.

    The following table describes the required settings on the Default Access Profile for a user role, which enable access to books for the role. Configuring the default access profile gives the user role the necessary access to books. Therefore, you do not have to configure the owner access profile for the role.

Record Type	Related Record	Default Access Profile
Books	Not applicable	ReadOnly.
Books	Sub Book	View. This profile allows the user to see all subbooks in the Book Detail page. The default is No Access.
Books	User	Read-Only. This profile allows the user to see all other users who are associated with the book in the Book Detail page. The default is No Access.

12 Click Finish to save your changes.

The following procedure describes how to enable books for a user. You must perform these steps for each user who uses books.

To enable books for a user

1. In the upper-right corner of any page, click the Admin global link
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the User Management section, click the User Management link.
4. Click the Edit link for the user whose profile you want to modify.
5. In the Key User Information section of the User Edit page, configure the following settings:
   - **Default Book for Analytics.** This setting determines the user book or custom book that appears by default for the user in the Book selector in the Analytics pages. The setting displays the user name and sign in ID (by default) of the user whose record you are editing. Change the setting of the record to the custom book or user book where the user most frequently works for reports and dashboards. The setting on the user record does not limit the user's access to data: the user can select a different book or user in the Book selector.
   - **Default Book.** This setting determines the user book or custom book that appears by default for the user in the Book selector when working in any area other than the Analytics pages. The setting displays All by default. Change the setting to the custom book or user book where the user most frequently works, so that the user does not have to select the book each time the user wants to work on data in the book. The setting on the user record does not limit the user's access to records: the user can select a different book or user in the Book selector.
6. In the User Security Information section of the User Edit page:
   a. Set the value for Reporting Subject Areas to either Manager Visibility or Team Visibility.

      NOTE: You must select one of these values. Otherwise, reports will not contain any data. The option that you select, Manager Visibility or Team Visibility, does not affect the data in the report.

   b. Set the value for Historical Subject Areas to Full Visibility.
7. Click Save.

NOTE: To access a book, the user must be associated with the book. In addition, a user's delegates do not automatically have access to a user's books. The delegates must also be associated with the books.

Adding Books to Record Detail Page Layouts

To make the Books related information section available for users on the detail page for a record type, you must configure the following:

- Make the Books related information section available in the record type page layout for the user role.

  NOTE: You can optionally create custom layouts for the Books related information section for each of the record types that support books. For example, you can create a custom layout for the Books related information section for the Account Detail pages through the Application Customization page for the Account record type. For information about creating custom layouts for related information sections, see Customizing Related Item Layouts (on page 1258).

- On the access profile for the user role, give the user role access to Books as a related information section on the record type.

The following procedure describes how to make the Books related information section available in a record type page layout.

To make the Books related information section available in a record type page layout

1. In the upper-right corner of any page, click the Admin global link.
2. Click the Application Customization link.
3. In the Record Type Setup section, click the link for the required record type.

   For example, if you want to make the Books related information available on the Opportunity Detail page, click the Opportunity link.
4. In the Page Layout section, click the required Page Layout link (for example, Opportunity Page Layout).
5. In the record type Page Layout page, click the Edit link for the page layout where you want to make the Book related information section available.
6. In the Page Layout wizard, go to Step 4, Related Information, and click the arrows to move the Books item to the Displayed section.
7. (Optional) In the Page Layout wizard, go to Step 5, Related Information Layout, and select the layout that you want to use for the Books related information section.
8. Click Finish to save your changes.
9. Sign out of Oracle CRM On Demand, and then sign in again.

The following procedure describes how to give a user role access to Books as a related information section on the record type.

To give a user role access to Books as a related information section on a record type

1. In the upper-right corner of any page, click the Admin global link
2. In the User Management and Access Controls section, click the User Management and Access Controls link.
3. In the Access Profile Management section, click Access Profiles.
4. Click the Edit link for the Default Access Profile that is used for the user role where you want to make the Books related information section available.
5. In the Access Profile wizard, go to Step 2, Specify Access Levels, and click the Related Information link for the record type where you want to make the Books related information section available.

   For example, if you want to make the Books related information available on the Opportunity Detail page, click the Related Information link beside the Opportunity record.
6. Select the access level for Books according to the requirements of the user role.
7. Click Finish to save your changes.
8. Repeat steps 4 through 7 for the Owner Access Profile that is used for the user role you are enabling for books.

Assigning Records to Books

You can assign records to custom books in the following ways:

- **One record at a time (manually).** You can select the book value on the record Detail page.
- **In bulk.** You can batch assign records to books.
- **By importing book assignments.** You can import book assignments for accounts and contacts only. For information about importing book assignments, see About Importing Books and Book Assignments (see About Importing Books and Book Assignments on page 1436).

Records can also be assigned to books using active workflow rules and conditions. For information about using workflow rules, see About Workflow Rules (on page 1491).

About the Start Date and End Date for Book Assignments on Accounts and Contacts

Book assignments for account and contact records can have a start date and an end date. You can update these fields by using the import assistant or Web services only. You must use the Web Services v1.0 API for all such Web services requests.

A book assignment remains effective until the end date is reached or until the book assignment is removed from the record, whichever comes first. When the end date is reached, the relationship between the book and the record is terminated, and users no longer have access to the record through membership of the book. However, users who have access to the record through other access-control components, such as record ownership or team membership, can still access the record.

For more information about managing time-based book assignments, see About Time-Based Book Assignments (on page 1437).

Before you begin:

- To assign records to books on a record Detail page, the Detail page layout for the record type must include the Book section.
- To batch assign records to books, you must have the Manage Books privilege in your user role.

The following procedure describes how to assign a single record to a book.

To assign a single record to a book

1. Navigate to the Detail page for the record.
2. On the title bar of the Books section of the Detail page, click Add.
3. In the book selector, choose the book to which you want to assign the record, and click OK.

The following procedure describes how to batch assign records to books.

To batch assign records to books

1. In the list window, click the Menu button on the title bar, then click Batch Assign Book.
2. In the Batch Assign Book window, click the selector button beside the Target Book box then, in the Book lookup, choose the book to which you want to assign records.
3. Choose an Assignment Option for the records in the list.

   The following table describes the Assignment Options that you can select.

Option	Description
Add	Adds the Target Book to all records. This assignment does not affect any previous book assignment for the records.
Replace Type	Adds the Target Book to all records and removes any previously assigned books that have the same type as the Target Book. **NOTE:** Book Types are defined by your company administrator.
Replace All	Adds the Target Book to all records and removes all previously assigned books, regardless of type.
Replace Book	Specifies the book that you want to replace.

Option	Description
	Reassigns records from the book you specify here to the Target Book. Other records are not affected.
Remove	Removes the existing assignment to the Target Book from all records.
Remove All	Removes all assigned books from the records.

4 If you choose any option other than Add in step 3, you must now choose an Apply To option.

The following table describes the Apply To options that you can select.

Option	Description
Manual Associations	Applies the Assignment Option to all selected records for which the existing book assignments were made manually
Automatic Associations	Applies the Assignment Option to all selected records for which the existing book assignments were made by workflow or batch
Both	Applies the Assignment Option to all selected records

5 To apply your chosen assignment criteria, click Assign.

The Batch Assign Request Queue page opens, showing your assignment request in the Active Requests section. For more information, see Batch Assign Request Queue Page (on page 1846).

When your request has been processed, you will be notified by email.

Book Hierarchy Page

The Book Hierarchy page shows information about custom books. You can view subsets of books or view all books.

The following table describes the tasks that you can perform from the Book Hierarchy page.

To do this	Follow these steps
View a different subset of books	On the Book Hierarchy title bar, click the list and change the selection to a different subset of books, or select All Books to view all books.
Create a book	On the Book Hierarchy title bar, click New. In the Book Edit page, enter the required information, and save the record.
Create a subbook for an existing book	Click the name link for the parent book. On the Book Details page, click New in the Sub-Books title bar. On the Book Edit page, enter the information for the book, and save your changes.
Move a book to a new parent book	Click the Edit link for the book that you want to change. In the Book Edit page, click the Lookup icon next to the Parent

To do this	Follow these steps
	Book field, select the new parent book, and then save your changes.
Associate users with a book	Click the name link of the book. On the Book Details page, click Add Users in the Book Users title bar. On the Book Edit page, pick the users whom you want to associate with the book, and specify the user information. For more information, see Associating Users with Books (on page 1448).

Book Fields

The Book Edit page and the Book Detail page show details of custom books. You can change the details of a book, add subbooks to a book, and add users to a book.

The following table provides additional information regarding some fields.

Field	Description
Key Book Information	
Book Name	The name given to the book.
Parent Book	Shows the name of the parent book if the book is a subbook. If the book is a root book, this field is blank.
Book Type	Books can be assigned a book type to help organize book structures. For information about creating book types, see Creating Book Types and Book User Roles (on page 1445).
Can Contain Data	Indicates if records can be associated with this book. For performance reasons, books that do not contain data must not have this check box selected.
Partner	Specific to Oracle CRM On Demand for Partner Relationship Management. For more information, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide* in the Oracle CRM On Demand documentation library on Oracle Technology Network.
Partner Location	Specific to Oracle CRM On Demand for Partner Relationship Management. For more information, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide* in the Oracle CRM On Demand documentation library on Oracle Technology Network.
Sub-Books Section	
Book Name	The name of a book that is a subbook of the current book.

Field	Description
Book Type	The book type of the subbook.
Can Contain Data	Indicates if records can be associated with the subbook.
Book Users Section	
Last Name	The last name of a user associated with this book.
First Name	The first name of a user associated with this book.
Book User Role	The user's book role for the current book. A book user role can be assigned to a user when the user is associated with a book. Book user roles are not user roles in Oracle CRM On Demand. For information about creating book user roles, see Creating Book Types and Book User Roles (on page 1445).
Access Profile	The user's access rights to the current book and any subbooks. Select from the list of profiles that are enabled for books. For information about creating access profiles specifically for books, see Creating Access Profiles for Books (on page 1450).

Information about Troubleshooting Books

For more information about troubleshooting book functionality, see 1800338.1 (Article ID) on My Oracle Support.

Group Management

Group Management is an optional feature that gives your company the ability to set up teams of people who work together, allowing them to share a common set of information.

Setting up groups at your company allows users to do the following:

- Group members can access group calendars and task lists, as follows:
  - Any appointment that is owned by a member of a group or has a member of the group on the activity team is visible to all members of the group in the merged calendar in the Group tab in the daily, weekly, and monthly calendar views, unless the appointment is marked as private. The merged calendar shows the availability for all members in the group, and allows employees to determine the best time to schedule appointments and to notify employees (and contacts) of appointments. Group members can also view the individual calendars of other members of the group, in the User tab in the Calendar page.

    NOTE: Users must have the Share Calendar privilege assigned to their role to be able to access the merged group calendar. Users who have the Share Calendar privilege can also set up custom calendar views. For more information, see Viewing the Calendars of Other Users (on page 222) and Adding Custom Calendar Views (on page 226).
  - Any task that is owned by a member of a group or has a member of the group on the activity team is visible to all members of the group in the task lists in the Group Tasks tab in the Calendar page, unless the task is marked as private.
- Group members can share ownership of the following record types automatically:
  - Account
  - Contact

- Household
- Opportunity
- Portfolio

When a record of any of these record types is assigned to a member of a group, all members of the group become joint owners of the record.

NOTE: If a contact is marked as private, then the details of the contact record cannot be read by other group members.

For example, if a user belongs to group XYZ, then any account that is assigned to the user after the user becomes a member of the group is included in the account lists for all members of group XYZ. On such records, the group name appears in the Primary Group field if this field is present on the Detail page layout. All of the members of the group, including the designated owner of the record, appear in the Team related information section on the record Detail page. All members of the group can update the record.

By default, the current group's members have full access to group records that were assigned to a group member after the member joined the group.

NOTE: For this functionality to work, the Default Group Assignment option in the Company Profile page must be selected. The option must be selected before the groups are created. For more information, see Setting Up Groups (on page 1461).

This behavior applies to groups:

- Each user can belong to only one group.

  After a user is added to a group, his name no longer appears on the user list when selecting group members.
- If you select the group assignment option at your company:
  - Records that exist before a group is defined are not updated unless the Owner field is updated with a new owner belonging to a group.
  - When a user joins a group, the user gains access to the group's records. However, records owned by the new group member prior to the user joining the group are not automatically visible to the existing group members. If a user becomes the owner of records after the user is added to a group, the new records are visible to other group members.

    The following example illustrates group record ownership:
    - User 1 and User 2 belong to Group 1. User 3 does not belong to Group 1.
    - User 3 owns Account 31. User 1 and User 2 will not have access to Account 31.
    - User 3 is added to Group 1. User 1 and User 2 still will not have access to Account 31.
    - User 3 becomes owner of Account 32. User 1 and User 2 will have access to Account 32.
- If users are deleted from a group, they are removed from all shared records that the group owns. They retain access to their private records.

  NOTE: If the name of the user who is deleted from the group appears in the Owner field on a shared record that the group owns, then the name in the Owner field on that record is changed to the name of another member of the group after the previous owner is deleted from the group. When such a change is made to the ownership of an opportunity record or a portfolio record, the system fields that store information about the most recent change to the record are updated, and the information shows that the record was updated by the Oracle Administrator user. However, in the case of the other record types that support groups, the system fields are not updated. For all record types that support groups, the change to the Owner field on the shared record is not tracked in the audit trail when the field is changed as a result of the user being deleted from the group, even if the Owner field is set up to be audited for the record type.

About Groups and Record Ownership Modes

Depending on the record ownership mode that you set up for a record type, records of that type might not have an owner. A record might instead have a primary custom book or might have no owner or primary custom book. For more information about record ownership modes, see About Record Ownership Modes (on page 1428). Record ownership modes apply only to record types that support books.

If you change the record ownership mode for a record type, then a record that previously had an owner might have the owner removed from the record when the record is updated for the first time after the ownership mode changes. In this case, if the former owner of the record is a member of a group, then all of the members of the group, except the former owner of the record, remain as members of the team. However, the Account record type is an exception to this rule. If the former owner of an account is a member of a group, then all of the members of the group are removed from the team.

NOTE: In the standard application, the former owner of the record is not retained as a member of the team, as described here. However, your administrator can configure the record type so that the former owner of the record is retained as a member of the team on the record. For information about configuring a record type to retain the former owner as a member of the team, see Customizing Previous Ownership for Shared Records (see Customizing Previous Ownership for Shared Records on page 1355).

Groups and Teams

Oracle CRM On Demand distinguishes between *Groups* and *Teams*:

- Groups are set up by the company administrator and apply to entire sets of records across the company. The Group feature must be enabled by Customer Care or by the company administrator when the company is set up for Oracle CRM On Demand.
- The record owners or company administrators set up teams. Teams apply to only those record types that allow teams, including:
  - Account
  - Accreditation
  - Activity
  - Application
  - Business Plan
  - Certification
  - Contact
  - Course
  - Custom Objects
  - Deal Registration
  - Event
  - Exam
  - Household
  - Lead
  - MDF Request
  - Objective
  - Opportunity
  - Order
  - Partner
  - Portfolio
  - Sample Request
  - Service Request
  - Special Pricing Request

To set up a team to access the record, the owner must explicitly share that record using the Team section on the record Detail page. For activity records, the record owner adds users to the activity team in the Users related information section in the activity Detail page.

For information on setting up groups, see Setting Up Groups (on page 1461).

Related Topics

See the following topics for related information about groups and sharing calendars:

- Viewing the Calendars of Other Users (on page 222)
- Adding Custom Calendar Views (on page 226)

Setting Up Groups

Before you begin. Do the following:

- Make sure your role includes the appropriate privileges, as follows:
  - To create, edit, or delete a group, your user role must include the Manage Roles and Access privilege.
  - To add users to a group or remove users from a group, your user role must include both the Manage Roles and Access privilege and the Manage Users privilege.
  - To turn the Default Group Assignment feature on or off, your role must include the Manage Company privilege.
- To understand how groups work, see Group Management (on page 1458).

Sequence for Setting Up Groups and Importing Users

When setting up groups, follow this sequence:

1. Turn on the Default Group Assignment feature.

   CAUTION: Before you set up or change a group, the Default Group Assignment feature must be turned on (that is, the Default Group Assignment option in the Company Profile page must be selected), even if you do not plan to use the default group assignment functionality. If you do not turn on this feature before you set up or change a group, the group will not perform correctly. If that happens, you must delete the group, turn on the Default Group Assignment feature, and then create the group again.

2. Create groups and assign users to the groups.
3. If you do not intend to use the default group assignment functionality, but you are using groups to allow users to see merged group calendars, turn off the Default Group Assignment feature when you have finished creating the groups and adding members to the groups.
4. Import your records with the default Owner (user), which will propagate groups to the records.

To turn on the default group assignment feature

1. In the upper right corner of any page, click the Admin global link.
2. Click the Company Administration link.
3. Click the Company Profile link.
4. On the Company Profile page, click Edit.
5. In the Company Data Visibility Settings section, select the Default Group Assignment check box.
6. Save the settings.

To set up a group

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the User Management and Access Controls link.

3 On the User Management and Access Controls page, in the User and Group Management section, click the Public Sharing Groups link.
4 On the Group List page, click New Group.
5 On the Group Edit page, complete the required fields.

Field	Description
Name	Limit of 50 characters. Required field by default.
Description	Limit of 255 characters.

NOTE: You can rename the group without affecting existing records, since the application uses the underlying group ID to track group records, not the group name. However, your group name needs to be unique within your company.

6 Click Save.
7 On the Group Detail page, click Add Members.
8 On the Group Members page, click the Lookup icons and add users.

Only users who have not been assigned to a group appear on the list. To determine which group a user belongs to, you need to go to that user's Detail page.

9 Save the record.
10 If you do not intend to use the default group assignment functionality, but you are using groups to allow users to see merged group calendars, turn off the Default Group Assignment feature when you have finished creating the groups and adding members to the groups.

To turn off the Default Group Assignment feature, do the following:

a In the upper right corner of any page, click the Admin global link.
b Click the Company Administration link.
c Click the Company Profile link.
d On the Company Profile page, click Edit.
e In the Company Data Visibility Settings section, clear the Default Group Assignment check box.
f Save the settings.

If you later decide to make changes to the groups or group membership, you must turn on the Default Group Assignment feature again before you make the changes, and then turn it off when you have finished making your changes.

About Changing the Default Group Assignment Setting

If your company decides to no longer use groups, you should follow this sequence before turning off the Default Group Assignment feature:

1 Delete all users except for the one you want to be the Primary Owner of the group's records.
2 Delete the group.
3 Clear the Default Group Assignment check box on the company profile.

Related Topics

See the following topics for related information about groups and sharing calendars:

- Group Management (on page 1458)
- Viewing the Calendars of Other Users (on page 222)
- Adding Custom Calendar Views (on page 226)

Territory Management

You can set up territories and territory hierarchies. For example, a company might organize its sales force into groups or territories. The territories might be based on geography, products, or industries. Each sales group is responsible for handling the accounts and sales opportunities in its territory. You can use the territories that you set up in Oracle CRM On Demand as the basis for assigning new account and opportunity records. For information on setting up territories, see Setting Up Territories (on page 1463).

Setting Up Territories

Before you begin:

- If your territories have not already been defined at your company, determine the naming convention and hierarchy before setting up the information in Oracle CRM On Demand. When entering the information, start from the top level, and then add the subterritories.
- To perform the following procedures, your role must include the Manage Territories privilege.

The following procedure describes how to set up a territory.

To set up a territory

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the Territory Management link.
3. On the Territory Hierarchy page, do one of the following:
   - To add a territory, click New Territory.
   - To update territory information, click the appropriate link in the Territory Name column, and then, on the Territory Detail page, click Edit.
4. On the Territory Edit page, enter the required information.

Field	Description
Territory Name	Limit of 50 characters.
Parent Territory	If this is a top-level territory, leave this blank.
Current Quota	You can enter a quota assigned to this territory.
Territory Currency	Inherits your company's default currency.

5. Save the record.
6. (Optional) On the Territory Detail page, click New in the Child Territories title bar to add subterritories.

To update the parent territory

1. In the upper right corner of any page, click the Admin global link.
2. In the User Management and Access Controls section, click the Territory Management link.
3. On the Territory Hierarchy page, select the child territory.
4. On the Territory Detail page, click Edit.
5. On the Territory Edit page, click the Lookup icon next to the Parent Territory field.
6. In the Lookup window, select the parent account.
7. Save the record.

To update records with territory

There are several ways to update the territory field on a record. Typically, this is an automated process:

- **Assignment Manager:** You can use Assignment Manager to populate this field and the related owner and team members for the record.
- **Import:** When you want to update territory ownership on many records, set the reassign owner flag to trigger the assignment of records using Assignment Manager.
- **Manual:** A user can assign their territory to a record.

How Access Rights Are Determined

For information about how Oracle CRM On Demand determines access rights to the data represented by the various record types, see the following topics:

- How Access Rights for Displaying Primary Record-Type Records Are Determined (on page 1464)
- How Access Rights for Working with Primary Record-Type Records Are Determined (on page 1464)
- How Access Rights for Displaying Related Record-Type Records Are Determined (on page 1466)
- How Access Rights for Working with Related Record-Type Records Are Determined (on page 1467)
- Examples of Access Level Calculations (on page 1469)

How Access Rights for Displaying Primary Record-Type Records are Determined

When a user tries to view a list of records of a primary record type by clicking a tab, or performing a search, or using a Web service, Oracle CRM On Demand uses the following process to determine the access rights of the user to records of that record type:

- Oracle CRM On Demand determines the permissions given to the user by the privileges on the user role.
- Oracle CRM On Demand determines the permissions given to the user by the record-type settings on the user role (Has Access, Can Create, and Can Read All Records).

If the user’s privileges allow the user to work with records of a given record type, and the Can Read All Records setting is selected for the record type on the user role, the user can see all records of that record type.

If the user’s privileges allow the user to work with records of a given record type, but the Can Read All Records setting is deselected for the record type on the user role, the user can see any records of that record type that the user owns, as well as any records of that record type that the user is authorized to see through any of the following access-control components:

- The reporting hierarchy
- Membership of custom books
- User delegation
- Team membership

Related Topics

See the following topics for related information:

- Access Profile Management (on page 1403)
- Examples of Access Level Calculations (on page 1469)
- Process of Setting Up Access Profiles (on page 1416)

How Access Rights for Working with Primary Record-Type Records are Determined

When a user tries to update, delete, or drill down to see more details on a primary record, Oracle CRM On Demand uses the following process to determine what actions the user can perform on the record:

- Oracle CRM On Demand determines the access levels granted by the access profile on the user's role:
  - If the user is the owner of the record, the user's owner access profile is used.
  - If the user is not the owner of the record, but the Can Read All Records option is selected for the record type on the user's role, the user's default access profile is used.
- Oracle CRM On Demand determines the access levels granted by each of the following access-control components:
  - The reporting hierarchy
  - Membership of custom books
  - User delegation
  - Team membership

More information about how Oracle CRM On Demand determines the access levels granted by the reporting hierarchy, membership of custom books, user delegation, and team membership is provided in the rest of this topic. Oracle CRM On Demand always uses the most permissive level of access from each of these access-control components, so keep this in mind when you create access profiles and assign them to users, books, and teams.

The combination of the access permissions for the record determines what actions the user can perform on the record. If the user has at least read-only access to the record, the record details are displayed. Otherwise, the user sees an error message.

Access Rights from the Reporting Hierarchy

To determine the access rights that can be granted through a user's position in the reporting hierarchy, Oracle CRM On Demand considers the following for each subordinate of the user:

- If the subordinate is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the current user.
- If the subordinate is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the subordinate as a team member.

NOTE: If the subordinate is not the record owner or a member of the team for the record, the subordinate does not contribute to the access calculation.

Oracle CRM On Demand then considers all of the access rights that subordinates contribute to the access calculation and calculates the most permissive access level that can be given to the user.

Access Rights from Membership of Custom Books

To determine the access rights that can be granted through a user's membership of custom books, Oracle CRM On Demand considers the following:

- If the record is associated with a book, then Oracle CRM On Demand extracts the access level for the record type from the access profile assigned to the user who is a member of the book.
- If the record is associated with a child book in a book hierarchy with multiple levels, such as grandparent, parent, and child, then the access level is extracted as follows:
  - If the user is a member of all three books, then the access level is derived from the access profiles of the user from each of the grandparent, parent and child books.
  - If the user is a member of the grandparent book only, then the access level is derived from the access profile of the user from the grandparent book.

In all cases, if one or more of the access levels for the record is Inherit Primary, then the inherited access level of the primary record type is used. If more than one access level for the record is Inherit Primary, then a union of the inherited access levels of the primary record types from each access profile is used. Oracle CRM On Demand then considers all levels of access that book membership contributes to the final access calculation and determines the most permissive access level that can be given to the user.

Access Rights from User Delegation

To determine the access rights that can be granted through user delegation, Oracle CRM On Demand considers the following for each delegator (that is, each user for whom the current user is a delegate):

- If the delegator is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the delegator.
- If the delegator is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the delegator in the team.
- If the subordinate of the delegator is the owner of the record, Oracle CRM On Demand extracts the access level for the primary record type from the owner access profile of the subordinate.
- If a subordinate of a delegator is a team member on the record, Oracle CRM On Demand extracts the access level for the primary record type from the access profile assigned to the subordinate in the team.

Oracle CRM On Demand then considers all levels of access that user delegation contributes to the access calculation and determines the most permissive access level that can be given to the user.

Access Rights from Team Membership

If the user is a team member on a record (but is not the owner of the record), Oracle CRM On Demand extracts the access level for the primary record type from the access profile on the user's team membership.

Related Topics

See the following topics for related information:

- Access Profile Management (on page 1403)
- Examples of Access Level Calculations (on page 1469)
- Process of Setting Up Access Profiles (on page 1416)

How Access Rights for Displaying Related Record-Type Records are Determined

When a user successfully views the Detail page for a record, Oracle CRM On Demand uses the following process to determine which related records the user can see:

- Oracle CRM On Demand verifies that the user's role has the necessary privileges to view the record type. If the user's role does not have the necessary privileges to view the record type, the records of this related record type are not shown.
- If the related record type is based on a primary record type, Oracle CRM On Demand verifies that the Has Access check box for the related record type is selected. If the Has Access check box is deselected for the related record type, the records of this related record type are not shown.
- If the owner of the parent record is the current user, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is the current user's subordinate at any level in the reporting hierarchy, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is an unrelated user:
  - If the Can Read All Records option is selected for the related record type on the current user's role, Oracle CRM On Demand extracts the access level for the related record type from the current user's default access profile.
  - If the Can Read All Records option is deselected for the related record type on the current user's role, the current user's default access profile is not used.

    In this case, the current user gains access to the Detail page of the parent record in one or more of the following ways:

    - The current user is a member of the team on the parent record.
    - The current user has a direct or indirect subordinate who has access to the parent record.

    - The current user is a member of a book that contains the parent record, or the parent record is in a subbook of a book where the current user is a member.
    - The current user has been delegated by another user who has access to the parent record.

  Oracle CRM On Demand therefore extracts the access levels for the related record type from the access profiles for the parent record through each of the applicable access-control components.

- Oracle CRM On Demand then evaluates all the related access levels to determine if the Inherit Primary access level is present in the set of access levels and determines what records to display, as follows:
  - If the Inherit Primary access level is not found:
    - If the most permissive access level is No Access, then the related records are not shown.
    - If the most permissive access level is anything other than No Access, then all related records are shown, including records the current user is not authorized to see.
  - If the Inherit Primary access level is found, and the Can Read All Records check box is selected for the related record type in the current user's role, then all related records are displayed.
  - If the Inherit Primary access level is found, and the Can Read All Records check box is deselected for the related record type in the current user's role, then the set of related records that is shown includes all records where any one of the following is true:
    - The current user owns the related record.
    - The current user is a member of the team on the related record.
    - The current user has a direct or indirect subordinate who has access to the record.
    - The current user is a member of a book that contains the related record, or the related record is in a subbook of a book where the current user is a member.
    - The current user has been delegated by another user who has access to the related record.

  NOTE: The Activities, Open Activities, and Closed Activities related record types are exceptions to the rules stated above. If the Inherit Primary access level is found for an activities related record type, and the Can Read All Records check box is deselected for the Activity record type in the current user's role, then the set of related activities that is shown includes only the activities that the user owns, activities that the user delegated to another user, and activities that are owned by a group that includes the user. Activities that the current user can access only through books, activities that the current user can access only because the user is a delegate for another user, and activities that the current user can access only through the reporting hierarchy are not included in the set of related activities.

Related Topics

See the following topics for related information:

- Access Profile Management (on page 1403)
- Examples of Access Level Calculations (on page 1469)
- Process of Setting Up Access Profiles (on page 1416)

How Access Rights for Working with Related Record-Type Records are Determined

When a user attempts to update, delete, or drill down to see more details on a related record, Oracle CRM On Demand uses the following process to determine what actions the user can perform on the record:

- If the owner of the parent record is the current user, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.
- If the owner of the parent record is the current user's subordinate at any level in the reporting hierarchy, Oracle CRM On Demand extracts the access level for the related record type from the current user's owner access profile.

- If the owner of the parent record is an unrelated user:
  - If the Can Read All Records option is selected for the related record type on the current user's role, Oracle CRM On Demand extracts the access level for the related record type from the current user's default access profile.
  - If the Can Read All Records option is deselected for the related record type on the current user's role, the current user's default access profile is not used.

    In this case, the current user gains access to the Detail page of the parent record in one or more of the following ways:

    - The current user is a member of the team on the parent record.
    - The current user has a direct or indirect subordinate who has access to the parent record.
    - The current user is a member of a book that contains the parent record, or the parent record is in a subbook of a book where the current user is a member.
    - The current user has been delegated by another user who has access to the parent record.

    When access to the related record is granted through the context of the parent record, Oracle CRM On Demand extracts the appropriate access level for the related record type from the access profiles for each of the applicable access-control components.

- For the related record, Oracle CRM On Demand also extracts the access levels from the current user's relationship to the related record where any one of the following is true:
  - The current user is a member of the team on the related record. If the current user is the owner of the related record, the user is also on the team, therefore the owner access profile is used.
  - The current user has a direct or indirect subordinate who has access to the related record.
  - The current user is a member of a book that contains the related record or the related record is in a subbook of a book where the current user is a member.
  - The current user has been delegated by another user who has access to the related record.
- Oracle CRM On Demand then evaluates all the applicable access levels to determine if the Inherit Primary access level is present in the set of access levels:
  - If the Inherit Primary access level (or any of its combinations) is found in the set of applicable access levels, the related record type inherits the role settings of its own primary record type as well as the access settings. The Inherit Primary access level setting determines the actions the user can perform on the records. If Oracle CRM On Demand finds two or more Inherit Primary access levels, the combination of the access levels is determined. For more information about the Inherit Primary access level and its combinations, see About Access Levels for Related Record Types (on page 1410).
  - If the Inherit Primary access level (or any of its combinations) is not found in the set of applicable access levels, then, if the related record type has a corresponding primary record type, Oracle CRM On Demand determines the intersection of the access levels for the primary record type and the related record type.

    For example, if the access level for the Opportunities related record type is Read-Only, and the access level for its corresponding Opportunity primary record type is Read/Edit, then the intersection of the access levels is Read-Only.

The combination of all the resulting access levels for the related record type determines what actions the user can perform on records of that record type.

Related Topics

See the following topics for related information:

- Access Profile Management (on page 1403)
- Examples of Access Level Calculations (on page 1469)
- Process of Setting Up Access Profiles (on page 1416)

Examples of Access Level Calculations

Click the following links to see some examples of how Oracle CRM On Demand calculates the access rights of users:

- Example 1: Using the View Access Level (on page 1469)
- Example 2: Using the Inherit Primary Access Level (on page 1473)
- Example 3: Securing Data Through Books (on page 1475)

The access rights in the examples are based on certain configurations of user roles, access profiles, and other access-control components. Oracle CRM On Demand calculates the access rights for an authenticated user each time the user interacts with it. Oracle CRM On Demand determines the access rights from the user's role and all of the access profiles that are applicable through owner access profiles, default access profiles, the reporting hierarchy, membership of custom books, user delegation, and team membership, which are referred to as the *access-control components.*

NOTE: Users can be employees of your company or employees of a partner organization. Users can also be external systems that access Oracle CRM On Demand.

Related Topics

See the following topics for related information:

- Access Profile Management (on page 1403)
- Process of Setting Up Access Profiles (on page 1416)

Example 1: Using the View Access Level

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, Amanda Jacobsen has the Sales Rep role. Amanda can create new accounts and see all other account records. She is allowed to create opportunities, but she can see only opportunities that she owns or that she is authorized to see.

The following table shows the record-type settings on the Sales Rep role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	Yes
Opportunity	Yes	Yes	No

The Sales Rep role gives Amanda full control over the accounts and opportunities that she creates and restricted rights on records that she does not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	View
Opportunity	Read/Edit/Delete	Not applicable	Not applicable

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	View
Opportunity	Read-Only	Not applicable	Not applicable

In this example of calculating access rights, it is assumed that team inheritance is not enabled for the Opportunity record type, that is, the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page is deselected. For more information about the behavior of the parent team inheritance functionality, see About Access Propagation Through Team Inheritance (on page 1406).

David Bloom also has a Sales Rep role in the same company. David has the same access rights as Amanda.

Amanda is the owner of Opportunity X, which is linked to Account 1. David creates an opportunity, Opportunity Y, and also links it to Account 1. Amanda is not on the opportunity team.

When Amanda views the list of the accounts in her company, she can see all accounts because her role allows her visibility to all accounts, including those she does not own. The following table shows the records that Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1		
Account Detail		
Account Name:	Account 1	
Owner:	Jonathan Hope	
Opportunities		
Opportunity Name	**Owner**	
Opportunity X	Amanda Jacobsen	
Opportunity Y	David Bloom	
Account Team		
Last Name	**First Name**	**Account Access**
Hope	Jonathan	Owner

Related Record Visibility in Example 1

To determine which related opportunity records Amanda can see on the account in this example, Oracle CRM On Demand examines Amanda's access rights, as follows:

1. Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

   NOTE: If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

   - Determines if Amanda owns the parent account.

In this example, the answer is no.

- Determines if Amanda's role allows her to read all account records.

  In this example, the answer is yes. Amanda's role allows her to read all account records, therefore Amanda can see the account. Because Amanda is not the owner of the parent account, her default access profile is used. The access level for the opportunity related record type on Amanda's default access profile is View.

- Determines if the parent record is in a book where Amanda is a book member.

  In this example, the answer is no.

- Determines if Amanda is a member of the account team.

  In this example, the answer is no.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the account team.

  In this example, the answer is no.

  If the answer to this question is yes (that is, one or more of Amanda's subordinates is a member of the account team), Oracle CRM On Demand extracts the access level for the opportunity related record type for each of those subordinates from the appropriate access profile. The access profile assigned in the Account Access field on the subordinate's team membership on the account is used in that case (not the access profile assigned in the Opportunity Access field).

- Determines if Amanda has access to the account record through delegation.

  In this example, the answer is no.

2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

  In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on the user's role.

- Determines if Amanda's role grants her the privilege for the opportunity record type.

  Opportunities are not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

  In this example, the answer is no.

3 Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the most permissive access level found is View. The Inherit Primary access level is not present, therefore all child opportunity records, including those the user is not authorized to see, are shown.

Actions on Related Records in Example 1

When a user attempts to perform an action on a related record, Oracle CRM On Demand must determine whether the user has the appropriate access rights for that action. In this example, Amanda can attempt to read the record details, or to edit the record, or to delete the record. Two cases are considered:

- In Case 1, Amanda attempts to perform an action on Opportunity X.
- In Case 2, Amanda attempts to perform an action on Opportunity Y.

Case 1: Amanda attempts to perform an action on Opportunity X, which she owns.

Oracle CRM On Demand examines Amanda's access rights, as follows:

1 Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

  NOTE: If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

- Determines if Amanda owns the parent account.

In this example, the answer is no.

- Determines if Amanda's role allows her to read all opportunity records.

  In this example, the answer is no. Although Amanda can see the parent account record because her default access profile is used, her default access profile is not used for the opportunity record.
- Determines if the opportunity record is in a book where Amanda is a book member.

  In this example, the answer is no.
- Determines if Amanda is a member of the opportunity team.

  In this example, the answer is yes. Amanda is the owner of the opportunity, and is therefore in the opportunity team. The access level of the primary opportunity record type from Amanda's default access profile (the Sales Rep Default Access Profile) is Read/Edit/Delete.
- Determines if any of Amanda's subordinates (direct or indirect) is a member of the opportunity team.

  In this example, the answer is no.
- Determines if Amanda has access to the account record through delegation.

  In this example, the answer is no.

2. Oracle CRM On Demand then does the following:
   - Determines if Amanda's role allows her basic access to opportunity records.

     In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.
   - Determines if Amanda's role grants her the privilege for the Opportunity record type.

     The Opportunity record type is not controlled through privileges. Therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.
   - Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

     In this example, the answer is no.
3. Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the most permissive access level found is Read/Edit/Delete.

Case 2: Amanda attempts to perform an action on Opportunity Y, which is owned by David Bloom.

Oracle CRM On Demand examines Amanda's access rights, as follows:

1. Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:

   NOTE: If multiple access levels are discovered from the various access-control components, all of them are considered when calculating access rights.

   - Determines if Amanda owns the parent account.

     In this example, the answer is no.
   - Determines if Amanda's role allows her to read all opportunity records.

     In this example, the answer is no. Although Amanda can see the parent account record because her default access profile is used, her default access profile is not used for the opportunity record.
   - Determines if the opportunity record is in a book where Amanda is a book member.

     In this example, the answer is no.
   - Determines if Amanda is a member of the opportunity team.

     In this example, the answer is no.
   - Determines if any of Amanda's subordinates (direct or indirect) is a member of the opportunity team.

     In this example, the answer is no.
   - Determines if Amanda has access to the account record through delegation.

In this example, the answer is no.

2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

  In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.

- Determines if Amanda's role grants her the privilege for the Opportunity record type.

  The Opportunity record type is not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

  In this example, the answer is no.

3 Oracle CRM On Demand then examines all of the access levels found and determines the most permissive level. In this case, the final access level is No Access.

Related Topics

See the following topics for additional examples:

- Example 2: Using the Inherit Primary Access Level (on page 1473)
- Example 3: Securing Data Through Books (on page 1475)

Example 2: Using the Inherit Primary Access Level

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, Amanda Jacobsen is a Sales Rep in her company. Amanda can create new accounts and see all other account records. She is allowed to create opportunities, but she can see only opportunities that she owns or that she is authorized to see.

The following table shows the record-type settings on the Sales Rep Role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	Yes
Opportunity	Yes	Yes	No

The Sales Rep role gives Amanda full control over the accounts and opportunities she creates, and restricted rights on records that she does not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	Inherit Primary
Opportunity	Read/Edit/Delete	Not applicable	Not applicable

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	Inherit Primary

Primary Record Type	Access Level	Related Record Type	Access Level
Opportunity	Read-Only	Not applicable	Not applicable

In this example of calculating access rights, it is assumed that team inheritance is not enabled for the Opportunity record type, that is, the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page is deselected. For more information about the behavior of the parent team inheritance functionality, see About Access Propagation Through Team Inheritance (on page 1406).

David Bloom is also a Sales Rep in the same company. David has the same access rights as Amanda.

Amanda is the owner of Opportunity X, which is linked to Account 1. David creates an opportunity, Opportunity Y, and also links it to Account 1. Amanda is not on the opportunity team.

When Amanda views the list of the accounts in her company, she can see all accounts because her role allows her visibility to all accounts, including those she does not own. The following table shows the records that Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1		
Account Detail		
Account Name:	Account 1	
Owner:	Jonathan Hope	
Opportunities		
Opportunity Name		**Owner**
Opportunity X		Amanda Jacobsen
Account Team		
Last Name	**First Name**	**Account Access**
Hope	Jonathan	Owner
Bloom	David	Member

Related Record Visibility in Example 2

To determine which related opportunity records Amanda can see on the account in this example, Oracle CRM On Demand examines Amanda's access rights, as follows:

1. Oracle CRM On Demand examines all of the applicable access levels for the opportunity related record type on this parent account record, as follows:
   - Determines if Amanda owns the parent account.

     In this example, the answer is no.
   - Determines if Amanda's role allows her to read all account records.

     In this example, the answer is yes. Amanda's role allows her to read all account records, therefore Amanda can see the account. Because Amanda is not the owner of the parent account, her default access profile is used. The access level for the opportunity related record type on Amanda's default access profile is Inherit Primary.

- Determines if the parent record is in a book where Amanda is a book member.

  In this example, the answer is no.

- Determines if Amanda is a member of the account team.

  In this example, the answer is no.

- Determines if any of Amanda's subordinates (direct or indirect) is a member of the account team.

  In this example, the answer is no.

  If the answer to the question is yes (that is, one or more of Amanda's subordinates is a member of the account team), Oracle CRM On Demand extracts the access level for the opportunity related record type for each of those subordinates from the appropriate access profile. The access profile assigned in the Account Access field on the subordinate's team membership on the account is used in that case (not the access profile assigned in the Opportunity Access field).

- Determines if Amanda has access to the account record through delegation.

  In this example, the answer is no.

2 Oracle CRM On Demand then does the following:

- Determines if Amanda's role allows her basic access to opportunity records.

  In this example, the answer is yes, because the Has Access option is selected for the Opportunity record type on Amanda's role.

- Determines if Amanda's role grants her the privilege for the opportunity record type.

  Opportunities are not controlled through privileges, therefore, in this example, the privileges do not affect the calculation of Amanda's access rights.

- Determines if the access level on any of the access profiles in the calculation is set to Inherit Primary or one of its combinations.

  In this example, the answer is yes, therefore Oracle CRM On Demand displays the following opportunity records on the account:

  - All linked opportunity records where Amanda is the owner.
  - All linked opportunity records that Amanda is authorized to see through all other access-control components.

  Amanda's role denies her the ability to see opportunities that she does not own, and so she cannot see the opportunity that David Bloom created.

Actions on Related Records in Example 2

When Amanda attempts to perform an action on Opportunity X in this example, the calculation is the same, and the outcome of the access rights is the same as that in Case 1 in Example 1: Using the View Access Level (on page 1469). The final access level is Read/Edit/Delete.

Related Topics

See the following topics for additional examples:

- Example 1: Using the View Access Level (on page 1469)
- Example 3: Securing Data Through Books (on page 1475)

Example 3: Securing Data Through Books

This topic provides one example of how Oracle CRM On Demand calculates the access rights of users.

In this example, a company uses custom books to organize its data by territory. Two books are used in this example: South West and East.

The South West book has three members:

- Amanda Jacobsen
- David Bloom
- Carlos Guzman

All users in the South West book have the Read-Only access profile on their book role.

The East book has three members:

- Rick Rogers
- Raj Kumar
- Jonathan Hope

All users in the East book have the Read-Only access profile on their book membership record.

When any of the users creates an account or opportunity record, an automated (workflow) process assigns the appropriate book to the record. It assigns the book based on the territory attribute of the record.

All of the users have the Sales Rep role. They can create new accounts and opportunities. They can see all account and opportunity records in their territory, but not in other territories.

The following table shows the record-type settings on the Sales Rep role.

Primary Record Type	Has Access	Can Create	Can Read All Records
Account	Yes	Yes	No
Opportunity	Yes	Yes	No

All of the users have full control over the accounts and opportunities that they create, but they have restricted rights on records that they do not own. The Sales Rep role requires two access profiles: an owner access profile and a default access profile.

The following table shows the settings for the Sales Rep Owner Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read/Edit/Delete	Opportunities	Inherit Primary
		Books	Read-Only
Opportunity	Read/Edit/Delete	Books	Read-Only

The following table shows the settings for the Sales Rep Default Access Profile.

Primary Record Type	Access Level	Related Record Type	Access Level
Account	Read-Only	Opportunities	Inherit Primary
		Books	Read-Only
Opportunity	Read-Only	Books	Read-Only

NOTE: For all primary record types that support books, the relationship with the Books related record type is a one-to-child relationship.

In this example of calculating access rights, it is assumed that team inheritance is not enabled for the Opportunity record type, that is, the Enable Parent Team Inheritance for Opportunity check box on the Company Profile page is deselected. For more information about the behavior of the parent team inheritance functionality, see About Access Propagation Through Team Inheritance (on page 1406).

When Amanda Jacobsen views the list of the accounts in her company, she can see the accounts in the South West book and the accounts she owns. She cannot see any other accounts.

The following table shows the records Amanda sees when she clicks the Account 1 account name to drill down on the record. For this example, only the relevant fields and columns are shown.

Account Detail: Account 1		
Account Detail		
Account Name:	Account 1	
Owner:	Jonathan Hope	
Opportunities		
Opportunity Name		**Owner**
Opportunity X		Amanda Jacobsen
Opportunity Y		David Bloom
Account Team		
Last Name	**First Name**	**Account Access**
Hope	Jonathan	Owner

Amanda can see two opportunities because those opportunities are in the South West book, where she is a member. All other members of the South West book can see those opportunities.

Jonathan Hope is a member of the East book. When Jonathan signs in to Oracle CRM On Demand, he can also see Account 1, because he owns the account. However, he cannot see any opportunities that are related to Account 1, but which he does not own. The Inherit Primary access level on the Opportunities related record type on accounts provides this security.

Rick Rogers and Raj Kumar, who are members of the East book, cannot see the Account 1, Opportunity X, or Opportunity Y records. They cannot see the account because it is not in the East book, and their role prevents them from seeing account records that they do not own. Similarly, they cannot see Opportunity X or Opportunity Y because these opportunities are not in the East book, and their role prevents them from seeing opportunities they do not own.

Amanda cannot modify the Opportunity Y, which is owned by David Bloom. This is because of the following:

- Amanda does not own the account, therefore her owner access profile is not used.
- Amanda’s role prevents her from accessing opportunity records that she does not own, therefore her default access profile is not used.
- The only access profile that is active at this point is the Read-Only access profile that Amanda has through her membership of the South West book.

Therefore, Amanda's access level to Opportunity Y is Read-Only.

Related Topics

See the following topics for additional examples:

- Example 1: Using the View Access Level (on page 1469)
- Example 2: Using the Inherit Primary Access Level (on page 1473)

Business Process Management

Click a topic to see step-by-step instructions to do the following:

- Creating Processes (on page 1484)
- Adding Transition States to Processes (on page 1485)
- Restricting Processes (on page 1487)
- Configuring the Field Setup for Transition States (on page 1487)
- Enabling Access Controls for Related Record Types (on page 1488)
- Creating Workflow Rules (on page 1511)
- Restricting Workflow Rules to Specific Channels or Roles (on page 1528)
- Creating Workflow Actions: Assign a Book (on page 1529)
- Creating Workflow Actions: Create Integration Event (on page 1531)
- Creating Workflow Actions: Create Task (on page 1534)
- Creating Workflow Actions: Send Email (on page 1538)
- Creating Workflow Actions: Update Values (on page 1543)
- Creating Workflow Actions: Wait (on page 1545)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Changing the Order of Workflow Rules (on page 1548)
- Deactivating Workflow Rules and Actions (on page 1549)
- Deleting Workflow Rules and Actions (on page 1550)
- Viewing Error Instances in the Workflow Error Monitor (on page 1552)
- Deleting Error Instances from the Workflow Error Monitor (on page 1553)
- Viewing Pending Instances in the Workflow Wait Monitor (on page 1558)
- Deleting Pending Instances from the Workflow Wait Monitor (on page 1559)
- Setting Up Assignment Rules (on page 1566)
- Mapping Additional Fields During Lead Conversion (on page 1571)
- Creating Lead Conversion Layouts (on page 1572)
- Setting Up the Forecast Definition (on page 1575)
- Updating the Forecast Definition (on page 1580)
- Setting Up Sales Processes, Categories, and Coaches (on page 1581)
- Customizing Your Company's Industry List (on page 1587)
- Modification Tracking (on page 1589)
- Enabling the Modification Tracking Feature (on page 1589)

Related Topics

See the following topics for related information:

- About Transition States and Transition Fields in Process Administration (on page 1479)
- About Primary Fields in Process Administration (on page 1480)
- Scenario for Locking Activity Records (on page 1480)

Process Administration

In the process administration section of Oracle CRM On Demand, you can set up processes to prevent users, including external applications, from performing certain actions on records of a given record type when the records are in a particular state. Preventing users from performing certain actions in this way is referred to as *locking records*.

The process administration functionality is not enabled in Oracle CRM On Demand by default. It must be enabled for each company by Oracle CRM On Demand Customer Care. If your company wants to use the process administration functionality, contact Oracle CRM On Demand Customer Care, and ask to have the Process Administration privilege granted to your company administrator's role.

When Oracle CRM On Demand Customer Care grants the Process Administration privilege to the company administrator, the company administrator can then grant the privilege to other roles.

NOTE: The controls that determine which records are locked are the last security component that Oracle CRM On Demand examines when calculating a user's rights to work with a record. The permissions granted by all of the other access-control components are examined first. An *access-control component* is functionality in Oracle CRM On Demand that contributes to the calculation of a user's rights to access and work with records. Examples of access-control components are: record ownership, access profiles, roles, teams, books, and the reporting hierarchy. The controls that lock records do not override any restrictions imposed by the other access-control components.

If necessary, you can allow certain users to override the record-locking processes that your company puts in place. For more information, see About Overriding Record-Locking Processes (on page 1489).

For information about processes and how to create them, see the following topics:

About Transition States and Transition Fields in Process Administration

In a process for a record type, you set up a number of transition states. A *transition state* represents a state that a record enters when certain conditions are met. A *transition field* is a picklist field on the record type that determines the transition of a record from one transition state to another. The picklist field for a process is identified in the definition of the process.

In a process, each value in the transition field can be linked to one transition state. For each transition state, you can specify the following information:

- **Condition.** The condition determines whether a record can move to this transition state.
- **Error message.** The error message appears if the condition is not met when a user tries to move a record to this transition state.
- **Record access controls.** The record access controls determine what actions users are prevented from performing on a record when the record is in the transition state. You can prevent users from deleting or updating records in the transition state.
- **Field setup.** The field setup determines the behavior of certain fields when a record is in the transition state.
- **Related access controls.** The related access controls determine what actions users are prevented from performing on related records when the parent record is in the transition state.

For example, you can set up a process for the Solution record type, using the Status field as the transition field, and add three transition states to the process, one for each of the following status values: Draft, Approved, and Obsolete. You can then prevent users from deleting solutions that are in the transition state for the Approved status, or prevent users from updating solutions that are in the transition state for the Obsolete status, and so on.

About Primary Fields in Process Administration

You can use a picklist field on a record type to restrict a process so that the process applies only to certain records of that record type. The picklist field is referred to as the *primary field*, and a process applies only to records where the value in the primary field on the record matches one of the values that you specify for the process, that is, the primary values. For example, the Call Type field can be used as the primary field on the Activity record type. You can restrict a process for the Activity record type so that the process applies only to certain types of call records.

Scenario for Locking Activity Records

This topic gives one example of how sales representatives in a pharmaceutical company use call activity records in Oracle CRM On Demand to record details of their visits to customers and of how the call activity records are locked at certain points. Your company might use Oracle CRM On Demand differently, depending on your business model.

A sales representative plans a visit to a local clinic to restock the sample cabinet at the clinic, and to talk to the head of the clinic about a new product that the pharmaceutical company is about to launch. The sales representative plans to give the head of the clinic a promotional CD that contains clinical trial results and a White Paper. When the sales representative sets up the call activity record in Oracle CRM On Demand, he sets the status of the record to Not Started.

When the sales representative arrives at the clinic, there is a delay while a staff member at the clinic gets the key to the samples cabinet. The sales representative uses the time to update the status of the call activity record in Oracle CRM On Demand to In Progress. The sales representative successfully stocks the samples cabinet, shares the message about the new product with the head of the clinic, and gives her the promotional material.

Towards the end of the day, the sales representative signs in to Oracle CRM On Demand and starts to update the records related to the activities of the day. The sales representative updates the call activity record for the call to the clinic, but he wants to review the record one more time before changing the status of the record to the final status of Submitted. However, the sales representative is scheduled to attend a sales meeting, so he sets the status of the record to Completed and leaves to attend the meeting. At this point, the record cannot be deleted from Oracle CRM On Demand.

When the sales representative returns from the meeting, he reviews the call activity record again and then sets the status of the record to Submitted. At this point, the call activity record cannot be updated, it cannot be deleted from Oracle CRM On Demand, and all of the fields on the record are read-only. In addition, other records cannot be linked to the submitted call activity record. An example of a process that supports this scenario is given in Example of Using Processes to Lock Records (on page 1481).

Example of Using Processes to Lock Records

This topic gives an example of creating a process to support the scenario described in Scenario for Locking Activity Records (on page 1480). You might use this feature differently, depending on your business model.

You create a process that limits the actions that users can perform, as follows:

- When the status of the record is Completed, users cannot delete the record.
- When the status of the record is Submitted, the following happens:
  - Users cannot update or delete the record, or link other records to the call activity record.
  - All fields on the call activity record are read-only.
- The process applies to account calls and professional calls but not to general calls.

To set up a process to lock call activity records

1. In Oracle CRM On Demand, create a process as follows:
   a. In the Process Name field, enter a unique name for the process.
   b. In the Object Name field, select Activity.

   When you select Activity in the Object Name field, the value in the Primary Field is automatically set to Call Type. The Transition Field is automatically set to Status. For more information about creating processes, see Creating Processes (on page 1484).
2. Add the transition states shown in the following table to the process that you created in Step 1 of this procedure.

   For more information about adding transition states to processes, see Adding Transition States to Processes (on page 1485).

State	Disable Update Check Box	Disable Delete/Remove Check Box
Not Started	Deselected	Deselected
In Progress	Deselected	Deselected
Completed	Deselected	Selected
Committed	Selected	Selected

3. Restrict the process so that it applies to account calls and professional calls but not to general calls, by adding the Account Calls and Professional Calls primary values to the process.

   For more information about restricting processes, see Restricting Processes (on page 1487).
4. On the Submitted transition state, configure the field setup, and select the Read-Only check box for all fields.

   For more information about configuring the field setup for transition states, see Configuring the Field Setup for Transition States (on page 1487).
5. On the Completed and Submitted transition states, enable the appropriate access controls for the related record types.

   The settings for the check boxes are shown in the following table. For more information about enabling access controls for related record types, see Enabling Access Controls for Related Record Types (on page 1488).

Transition State	Related Record Type	Disable Create/Add	Disable Update	Disable Delete/ Remove
Completed	Message Responses	Deselected	Deselected	Selected
	Products Detailed	Deselected	Deselected	Selected
	Promotional Item Dropped	Deselected	Deselected	Selected
	Samples Dropped	Deselected	Deselected	Selected
	Sample Requests	Deselected	Deselected	Selected
	Sample Transactions	Deselected	Deselected	Selected
	Signatures	Deselected	Deselected	Selected
	Solutions	Deselected	Deselected	Selected
Submitted	Attachments	Selected	Selected	Selected
	Books	Selected	Selected	Selected
	Contacts (M:M)	Selected	Selected	Selected
	Custom Objects 01 through 03	Selected	Selected	Selected
	Message Responses	Selected	Selected	Selected
	Products Detailed	Selected	Selected	Selected
	Samples Dropped	Selected	Selected	Selected
	Sample Requests	Selected	Selected	Selected
	Sample Transactions	Selected	Selected	Selected
	Signatures	Selected	Selected	Selected
	Solutions (M:M)	Selected	Selected	Selected

NOTE: Sample request records have sample request item records linked to them that must also be locked when the parent record is locked. To lock the sample request item records, you must set up a separate process that is based on the Sample Request record type. Similarly, sample transaction records have transaction item records linked to them. To lock the transaction item records, you must set up a separate process that is based on the Sample Transaction record type. The process that you set up for a record type locks the parent records of that record type and their child records, but the process does not lock any records that are linked to the child records.

Process Administration Functionality

The following record types are supported for process administration:

- Account
- Activity
- Address
- Business Plan
- Call Product Detail
- Event
- Lead
- Messaging Plan
- Objective
- Opportunity
- Sample Disclaimer
- Sample Request
- Sample Transaction
- Service Request
- Solution

Restrictions

The following restrictions apply:

- Only one process can be set up for each of the record types that support process administration.
- For each of the supported record types, the Status field on the record type is used as the transition field for the process. You cannot select an alternative transition field.

  NOTE: Users cannot change the status of a call product detail record directly. Oracle CRM On Demand updates the status of a call product detail record when the status of the related call is updated, so that the status of a call product detail record is always the same as the status of the related call.

- Only the Activity record type supports the use of a primary field to restrict the process. The primary field on the Activity record type is the Call Type field. You cannot select an alternative primary field.
- The options for the field setup for transition states are limited to specifying that certain fields are read-only when a record is in the transition state.
- The Order Number field and the Default check box, which appear on the process record when you save the process, are not used in the current release of Oracle CRM On Demand.

Related Record Types

For each parent record type that is supported for process administration, you can enable access controls for all of the related record types that are supported for the parent record type and that are available to your company, with the exceptions shown in the following table.

Parent Record Type	Related Record Types Not Supported
Account	- Assessments - Financial Account: Branch - Financial Account: Held-Away Institutions
Activity	Assessments
Business Plan	Assessments

Parent Record Type	Related Record Types Not Supported
Lead	Assessments
Objective	Assessments
Opportunity	Assessments
Service Request	Assessments

NOTE: You can allow certain users to override the record-locking processes that your company puts in place. For more information, see About Overriding Record-Locking Processes (on page 1489).

Process of Setting Up Processes in Oracle CRM On Demand

To set up a process in Oracle CRM On Demand, perform the following tasks:

1 Creating Processes (on page 1484)
2 Adding Transition States to Processes (on page 1485)

You can also optionally perform the following tasks:

- Restricting Processes (on page 1487)
- Configuring the Field Setup for Transition States (on page 1487)
- Enabling Access Controls for Related Record Types (on page 1488)

Creating Processes

To create a process, complete the steps in the following procedure. This task is a step in Process of Setting Up Processes in Oracle CRM On Demand (on page 1484).

Before you begin. To perform this procedure, your role must include the Process Administration privilege.

To create a process

1 In the upper-right corner of any page, click the Admin global link.
2 In the Business Process Management section, click Process Administration.
3 In the Process List page, click New.
4 In the Process Edit page, fill in the process information.
5 Save your changes.

NOTE: The Order Number field and the Default check box that appear on the Process Detail page when you save a process are not used in the current release of Oracle CRM On Demand.

The following table describes the process fields. For more information about how these fields are used in the current release of Oracle CRM On Demand, see the restrictions listed in Process Administration Functionality (on page 1483).

Field	Description
Process Name	The name that you give to the process.

Field	Description
Record Type	The record type for the process. For a list of the record types for which you can create processes, see Process Administration Functionality (on page 1483).
Primary Field	The name of the field in the record type that is to be used as a filter to restrict the process to certain records of the record type. This field is read-only. For the Activity record type, the default value in the Primary Field is Call Type. For other record types, the field is blank. For more information about primary fields, see About Primary Fields in Process Administration (on page 1480).
Transition Field	The name of the field in the record type that determines the transition of records from one transition state to another. This field is read-only. For all supported record types, the default value is Status. For more information about transition fields, see About Transition States and Transition Fields in Process Administration (on page 1479).
Description	(Optional) A description of the process.

Adding Transition States to Processes

In a process, you can link each value in the transition field to one transition state. For more information about transition fields and transition states, see About Transition States and Transition Fields in Process Administration (on page 1479).

To add a transition state to a process, complete the steps in the following procedure. This task is a step in Process of Setting Up Processes in Oracle CRM On Demand (on page 1484).

Before you begin. To perform this procedure, your role must include the Process Administration privilege.

To add a transition state to a process

1. In the Process List page, click the Process Name link for the process to which you want to add the transition state.
2. In the Process Detail page, scroll to the Transition States section of the page, and then click Add in the title bar of the section.
3. In the Transition State Edit page, fill in the transition state information.
4. Save your changes.
5. Repeat Step 2 through Step 4 of this procedure for each transition state that you want to add to the process.

The following table describes some of the transition state fields. The headings in the Key Information section and the Validation section of the page in Oracle CRM On Demand show the name of the transition field.

Field	Description
Key Information	
State	The transition field value that identifies this transition state. Each transition field value can be used with only one transition state in the process. When a value has been used with a transition state, the value is removed from the picklist of values in the State field.
Category	(Optional) The sales category that the transition state is associated with.
Description	(Optional) A description of the transition state.
Validation	
Condition	(Optional) A condition that determines whether a record can move to this transition state. You can enter an expression directly in the text box, or click the *fx* icon to open the Expression Builder window, where you can define an expression. For more information about Expression Builder, see Expression Builder (on page 1886). Do not use any calculated fields in the expression. Calculated fields are not supported in expressions in the Condition field on transition states. If the condition that you specify is not met when a user tries to move a record of the record type specified in the process to this transition state, then an error message appears and the user's changes are not saved.
Error Message	(Optional) The text of the error message that appears if the condition set for the transition state is not met when a user tries to move a record of the record type specified in the process to this transition state.
Record Access Control	
Disable Update	(Optional) If this check box is selected, then users, including external applications, cannot update records of the record type specified in the process when the records are in this transition state.

Field	Description
Disable Delete/Remove	(Optional) If this check box is selected, then users, including external applications, cannot delete records of the record type specified in the process while the records are in this transition state. Also, if a record in this transition state is a child of a parent record, then users cannot remove the record from the relationship if doing so results in the child record being deleted from Oracle CRM On Demand. However, if removing the child record from the relationship with the parent record does not result in the child record being deleted from Oracle CRM On Demand, then the record can be removed from the relationship while the record is in this transition state, but it cannot be deleted.

Restricting Processes

To restrict a process so that it applies only to certain records of that record type, you specify which values in the primary field in the record type are valid for the process. For more information about primary fields, see About Primary Fields in Process Administration (on page 1480).

To restrict a process, complete the steps in the following procedure.

Before you begin. To perform this procedure, your role must include the Process Administration privilege.

To restrict a process

1. In the Process List page, click the Process Name link for the process that you want to restrict.
2. In the Process Detail page, scroll to the Primary Values section of the page, and then click Add in the title bar of the section.
3. In the Primary Value Edit page, in the Value field, select the values to which the process is to be restricted.

   You can select up to five values in the Primary Value Edit page. If you want to select additional values, you can repeat this procedure.
4. Save your changes.
5. Repeat Step 2 through Step 4 of this procedure as many times as necessary to add more primary values.

Configuring the Field Setup for Transition States

You can specify how certain fields behave when a record is in the transition state by configuring the field setup for the transition state.

To configure the field setup for a transition state, complete the steps in the following procedure.

Before you begin. To perform this procedure, your role must include the Process Administration privilege.

To configure the field setup for a transition state

1. In the Process Detail page, click the link in the State field for the transition state for which you want to configure the field setup.

2. In the Transition State Detail page, scroll to the Field Setup section of the page, and then click Add in the title bar of the section.
3. In the Field Setup Edit page, specify the behavior of fields when a record of the record type specified in the process is in this transition state, as follows:
   a. Select the field in the Field list.
   b. Select the check box for the behavior that you want to configure for the field.

      NOTE: For information about restrictions that apply to configuring the field setup for transition states, see Process Administration Functionality (on page 1483).

      CAUTION: If you want to set a check box field as read-only, the field must already be displayed on the page layout where it is to be used. Otherwise, when the field is added to a page layout, an error message is displayed when users try to save a record of this type.

   You can specify settings for up to five fields in the Field Setup Edit page. If you want to specify settings for additional fields, you can repeat this procedure.
4. Save your changes.
5. Repeat Step 2 through Step 4 of this procedure as many times as necessary to set up all the fields that you want to configure for the transition state.

Enabling Access Controls for Related Record Types

You can limit the actions that users can perform on the related records when a parent record is in the transition state by enabling access controls for the related record types.

NOTE: Some record types do not have related record types.

To enable access controls for related record types, complete the steps in the following procedure.

Before you begin. To perform this procedure, your role must include the Process Administration privilege.

To enable access controls for related record types

1. In the Process Detail page, click the link in the State field for the transition state on which you want to enable access controls for related record types.
2. In the Transition State Detail page, scroll to the Related Access Control section of the page, and then click Add in the title bar of the section.
3. In the Related Access Control Edit page, for each related record type, select the check boxes for the access controls that you want to enable.

   You can enable access controls for up to five related record types in the Related Access Control Edit page. If you want to enable access controls for additional related record types, you can repeat the procedure.

   NOTE: In the Related Access Control Edit page, the check boxes for the access controls are marked as required; that is, an asterisk appears beside the name of each of the check boxes. The check boxes are marked as required because these check box fields always have a value in the database. The value is either True, that is, the check box is selected, or False, that is, the check box is deselected. If you select a check box, the True value is saved in the database. If you do not select a check box, the False value is saved in the database.
4. Save your changes.
5. Repeat Step 2 through Step 4 of this procedure as many times as necessary to enable the access controls for the related record types for the transition state.

The following table describes the access controls for the related record types. Some related record types are not available. For a list of the related record types that are not available, see Process Administration Functionality (on page 1483).

NOTE: Users can be external applications as well as users of Oracle CRM On Demand.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Disable Create/Add</td><td>If this check box is selected, then users cannot create new records of this related record type from the parent record or add existing records of this record type to the parent record while the parent record is in this transition state.</td></tr>
<tr><td>Disable Update</td><td>The behavior of this check box depends on the relationship between the parent record type and the related record type, as follows:
If the parent record type has a one-to-many relationship with the related record type, and if this check box is selected, then users cannot update records of this related record type that are child records of the parent record, while the parent record is in this transition state.
The child records cannot be updated from anywhere in Oracle CRM On Demand while the parent record is in this transition state. For example, if there are related records of the Custom Object 05 record type on the parent record, then those Custom Object 05 records cannot be updated while the parent record is in this transition state even if they are accessed from the Custom Object 05 Homepage.
For related record types that have a many-to-many relationship with the parent record type, the Disable Update check box is not applicable, that is, it cannot be used to prevent users from updating related records of that type while the parent record is in this transition state.</td></tr>
<tr><td>Disable Delete/Remove</td><td>The behavior of this check box depends on the relationship between the parent record type and the related record type, as follows:
If the parent record type has a one-to-many relationship with the related record type, and if this check box is selected, then users cannot delete records of this related record type that are child records of the parent record while the parent record is in this transition state.
The child records cannot be deleted from anywhere in Oracle CRM On Demand while the parent record is in this transition state.
If the related record type has a many-to-many relationship with the parent record type, and if this check box is selected, then users cannot remove child records of this record type from their relationship with the parent record while the parent record is in this transition state. However, users can delete the child records from other places in Oracle CRM On Demand, such as from a list accessed from the record-type Homepage.</td></tr>
</table>

About Overriding Record-Locking Processes

Certain users such as administrators or managers might need to work with locked records without being restricted by the record-locking processes. You can allow a user to override the record-locking processes by enabling the Override Process Administration privilege on the user's role.

The Override Process Administration privilege removes only the restrictions that are put in place by the record-locking processes. To work with the locked records, the users must have visibility to the records and have the appropriate access levels and permissions. The Override Process Administration privilege allows users to override the record-locking processes for all record types. You cannot specify that a user is allowed to override the record-locking processes for some records or record types only.

NOTE: The Override Process Administration privilege is not available by default. If you want the privilege to be enabled for your company, then contact Oracle CRM On Demand Customer Care.

Workflow Configuration

To configure workflow rules to meet your company's business requirements, do the following:

1. Work with all the stakeholders to plan the business processes.
2. Document all of the workflow rules and the corresponding workflow actions that you must configure. For more information about the components of workflow rules, see About Workflow Rules (on page 1491).
3. Sign in to Oracle CRM On Demand as the company administrator, and create the workflow rules. For more information, see Creating Workflow Rules (on page 1511) and Creating Scheduled Events (on page 1517).
4. Within the new workflow rules and scheduled events, define all the required workflow actions. For information about creating the various types of workflow actions, see the following topics:
   - About Workflow Actions (on page 1500)
   - Creating Workflow Actions: Assign a Book (on page 1529)
   - Creating Workflow Actions: Create Integration Event (on page 1531)
   - Creating Workflow Actions: Create Task (on page 1534)
   - Creating Workflow Actions: Send Email (on page 1538)
   - Creating Workflow Actions: Update Values (on page 1543)
   - Creating Workflow Actions: Wait (on page 1545)
   - Deactivating Workflow Rules and Actions (on page 1549)
   - Deleting Workflow Rules and Actions (on page 1550)

About Setting Up Workflow Rules Functionality

If you are a new customer, then the workflow rules functionality is automatically enabled. However, if you are an existing customer, then Oracle CRM On Demand Customer Care and your company administrator must configure the Oracle CRM On Demand workflow rules functionality, as follows:

- **Oracle CRM On Demand Customer Care Setup.** When Oracle CRM On Demand Customer Care sets up the workflow rules functionality, the Workflow Configuration link is visible in the Business Process Management section of the Admin Homepage. Also, the Administrator user role has the Manage Data Rules - Manage Workflow Rules privilege enabled. For more information about user roles, see Adding Roles (on page 1396).

  NOTE: To create workflow rules for the User record type, you must also have the Manage Data Rules - Manage Workflow Rules for Users privilege in your user role. Your administrator can enable this privilege for the Administrator role and for any other role as necessary. For more information about considerations when creating workflow rules for the User record type, see Considerations When Creating Workflow Rules for the User Record Type (on page 1510).

- **Enable Workflow option.** Workflow rules cannot be executed until the company administrator selects the Enable Workflow check box on the Company Profile page. For information about configuring your company profile, see Setting Up Your Company Profile and Global Defaults (on page 1123).
- **Integration events.** An *integration event* is a mechanism for triggering external processes that are based on changes to the records in Oracle CRM On Demand, including create, update, delete, associate, dissociate, restore, and merge operations. You can specify which fields on a record that you want to track. If your

company wants to use workflow rules to create integration events, then contact Oracle CRM On Demand Customer Care to request support for Integration Event Administration and to specify the total size of the integration event queues that you require. When the value changes in a tracked field, the change is recorded in the integration event. You can also specify to which integration event queues the integration events are added. For more information about managing integration events, see About Integration Events (on page 1848).

- **Books.** If your company wants to use workflow rules to update the associations between records and books, contact Oracle CRM On Demand Customer Care to request support for Book Management. For more information about book management, see Book Management (on page 1421).

About Workflow Rules

A *workflow rule* is an instruction to Oracle CRM On Demand to perform one or more actions automatically when a specified event occurs.

Trigger Events and Actions on Workflow Rules

A workflow rule is evaluated when the event specified on the rule (the trigger event) occurs. If the conditions on the rule are met (or if there are no conditions on the rule), then the actions specified on the rule are performed. For example, you can create a workflow rule to specify that when an opportunity is created (the workflow rule trigger event), an email is sent to the opportunity owner's manager (the workflow rule action). You can also specify that the email is sent only if the revenue on the opportunity is in excess of a certain amount (the workflow rule condition), and you can specify the content of the email.

You can also configure workflow rules so that actions are performed when a specified period of time has passed, or when a specified date and time is reached. For more information about time-based workflow actions, see About Time-Based Workflow Rules (on page 1502) and About Scheduled Events (on page 1515).

Workflow rules can be triggered by one of the following:

- A record is created, updated, restored, merged, or deleted.

  NOTE: An update to a record by a workflow action does not trigger new sequences of workflow rules. For example, if an Update Values action on a workflow rule for the account record type updates a field on an account record, then this change to the record does not trigger any workflow rules for the account record type, even if some of those rules have the Before Modified Record Saved trigger or the When Modified Record saved trigger events. If you want Oracle CRM On Demand to perform any additional actions as a result of the change to the record, then those actions must be configured on the same workflow rule as the action that updated the record.

- A record is associated with another record or dissociated from another record.

  Association and dissociation workflow rule triggers are supported for associations between certain record types only. For more information, see About Association and Dissociation Trigger Events (on page 1496).

- A specified date and time has been reached.

NOTE: Workflow rules support cascade-delete operations and deep-delete operations. For example, when an account is deleted, any related address that is an unshared address is also deleted. The deletion of an address in turn triggers any workflow rules for the Address record type that have the Before Record Is Deleted trigger event. For more information about cascade-delete operations and deep-delete operations, see About Deleting and Restoring Records (on page 169).

There are several types of trigger events for workflow rules, but each workflow rule has only one trigger event. Depending on the trigger event you select for the rule, you can specify that Oracle CRM On Demand is to perform one or more actions automatically when the workflow rule conditions are met.

The trigger event for each rule is shown on the Workflow Rules List Page and on the Workflow Rule Detail page. Depending on the type of trigger event that is selected for a workflow rule, the rule is one of the following types:

- **Pre-event workflow rule.** The workflow actions occur before the event that triggers the rule is completed.
- **Post-event workflow rule.** The workflow actions occur after the event that triggered the workflow rule has been successfully completed.
- **Scheduled event.** The scheduled event type is a subtype of the post-event rule type.

  A scheduled event is a workflow rule that is not triggered by a user action. Instead, the scheduled event is automatically executed when a specified date and time is reached. You can optionally configure a scheduled event to be executed multiple times, at an interval that you specify on the scheduled event.

  For more information about scheduled events, see About Scheduled Events (on page 1515), Creating Scheduled Events (on page 1517), and Creating Scheduled Events for Analytics (on page 1521).

Workflow rules are configured for a record as a whole, and not for individual fields. Scheduled events are configured for lists of records, and scheduled events for Analytics are configured to be executed for specified users.

NOTE: After a rule is created, you cannot change the record type or trigger event on the rule. However, if there is a condition on the rule, then you can update the condition. On scheduled events, you can update the schedule or select a different list.

The following table shows the actions that are available for each trigger event.

Trigger Event	Rule Type	Available Actions
When New Record Saved	Post-event	■ Send Email ■ Create Task ■ Assign a Book ■ Create Integration Event ■ Wait ■ Update Values
When Modified Record Saved	Post-event	■ Send Email ■ Create Task ■ Assign a Book ■ Create Integration Event ■ Wait ■ Update Values
Before Record Is Deleted	Pre-event	■ Send Email ■ Create Task ■ Create Integration Event
Before Modified Record Saved	Pre-event	■ Update Values
After Association With Parent	Post-event	■ Send Email ■ Create Integration Event ■ Wait
After Dissociation From Parent	Post-event	■ Send Email ■ Create Integration Event ■ Wait
When Record Is Restored	Post-event	■ Send Email ■ Create Integration Event ■ Create Task

Trigger Event	Rule Type	Available Actions
When Records Are Merged	Post-event	- Send Email - Create Integration Event - Create Task
Scheduled Event	Scheduled event	- Send Email - Create Task - Assign a Book - Update Values **NOTE:** For scheduled events for the Analytics record type, only the Send Email action is supported.

Some additional workflow actions are available for Oracle CRM On Demand Life Sciences Edition and Oracle CRM On Demand for Partner Relationship Management. For more information, see About Workflow Actions (on page 1500).

NOTE: Processing of blocked products is not supported for sample request items when you use workflows in Oracle CRM On Demand. For more information, see About Sample Request Item Workflows and Blocked Product Rules (on page 647).

NOTE: For certain record types, workflow rules that are configured with the When Record is Restored trigger event are never triggered because it is currently not possible to restore a record of that type. For example, it is currently not possible to restore an account team record. If support for restoring such record types is added in the future, then any workflow rules that are configured with the When Record is Restored trigger event will be triggered where appropriate.

Restrictions That Apply to Workflow Rules and Rule Actions

The following restrictions apply to workflow rules with any trigger event other than Scheduled Event, and to the actions on those rules:

- **Workflow rule conditions.** If you define conditions on a workflow rule, then the workflow rule actions are performed only if the rule conditions are met when the rule is triggered. If the conditions are not met, then the actions are not performed. If you do not define any conditions on a workflow rule, then the workflow rule actions are performed each time the rule is triggered.
- **Single-record context.** A workflow rule that is triggered when a record is created, updated, or deleted, is restricted to work in the context of a single record—that is, such a workflow rule can access and update fields on only one record.

  NOTE: When a workflow rule is triggered by a record association or dissociation action, the integration event created by the workflow can contain fields from both the child record and the parent record.

The following restrictions apply to all workflow rules and scheduled events, and to the actions on those rules and scheduled events:

- **Multiple actions on workflow rules and scheduled events.** You can create multiple actions for a workflow rule or scheduled event.

  You can create up to a maximum of 25 actions for a workflow rule. For a scheduled event, you can create up to a maximum of 5 workflow actions. If you try to create more actions than are allowed on a workflow rule or scheduled event, then you receive an error message.

  NOTE: If a workflow action on a workflow rule or scheduled event terminates unexpectedly without being completed, then the remaining actions on the workflow rule or scheduled event might not be performed. For information about what happens when a workflow action fails, see About Workflow Rule and Workflow Action Failures (on page 1504).

- **Record types.** You can create workflow rules and scheduled events for a number of record types. However, each workflow rule or scheduled event applies to only one record type. This means that if you create a workflow rule or scheduled event for a specific record type and you want the same action to occur for another record type, then you must create a second, similar workflow rule or scheduled event for the second record type.

Workflow Rule Order

When you create a workflow rule, Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules that are based on the same record type and the same trigger event. If the trigger event for the workflow rule is After Association With Parent or After Dissociation From Parent, then Oracle CRM On Demand automatically assigns the rule to the next unused order number for rules that are based on the same record type, the same trigger event, and the same parent record type. For workflow rules that have a trigger event other than Scheduled Event, the order number determines the order in which Oracle CRM On Demand invokes a sequence of workflow rules that are based on the same record type and the same trigger event, and if applicable, on the same parent record type. You can change the order of your rules.

NOTE: Workflow rules that have the Scheduled Event trigger event are also assigned an order number but they are not performed in sequence. The order number is read-only for scheduled events.

For more information about changing the order of workflow rules, see Changing the Order of Workflow Rules (on page 1548).

Exiting a Sequence of Workflow Rules

For workflow rules with any trigger event other than Scheduled Event, you can specify that Oracle CRM On Demand is to stop processing a sequence of workflow rules if the condition on a workflow rule is met. When a workflow rule is triggered, the condition on the rule is evaluated. If the condition on the rule is met and the Exit check box on the workflow rule is selected, then the active actions on the current workflow rule are performed, but the subsequent workflow rules that are based on the same record type and the same trigger event, and where applicable, the same parent record type, are not processed.

Workflow Action Order

Where there are multiple actions on a workflow rule or scheduled event, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. You can change the order of the actions on a rule. For more information about workflow actions, see About Workflow Actions (on page 1500).

For a scheduled event, the actions are performed for the records that are returned by the filtered list on that date. The records are processed in sequence, that is, all of the workflow actions on the scheduled event are performed in the order specified on the scheduled event for the first record in the list, then all of the actions are performed for the second record in the list, and so on.

Workflow Rule and Workflow Action Failures

If a workflow rule, scheduled event, or workflow action fails to complete, then depending on the type of trigger event on the workflow rule or scheduled event, and on the type of error, the failure is either reported in the Workflow Error Monitor, or reported to the user whose actions triggered the workflow rule. For more information, see About Workflow Rule and Workflow Action Failures (on page 1504).

Record Visibility and Workflow Actions

When a user performs an action that triggers a workflow rule, some of the actions on the workflow rule can fail if the user's action resulted in the user losing visibility to the record.

For example, you might have a workflow rule that is triggered when a modified account record is saved. If a user who owns an account record reassigns the account to another user, then the workflow rule is triggered when the account record is saved. If the original owner of the record no longer has visibility to the account record through any other means, such as team or book membership, then any workflow action that requires access to the account record fails.

Similarly, an instance of a scheduled event fails if the user who made the scheduled event active no longer has access to the list that was selected on the scheduled event.

Record Ownership Modes and Workflow Actions

You can configure record types that support custom books in different ownership modes: user mode, mixed mode, or book mode. For more information about records ownership modes, see About Record Ownership Modes (on page 1428). The record ownership mode interacts with workflow rules and actions.

If an Assign a Book workflow action attempts to remove the primary custom book from a record, then the following happens:

- If the record type is configured in book mode, then the workflow action fails.
- If the record type is configured in mixed mode, then Oracle CRM On Demand removes the value in the Book field on the record when the primary custom book is removed from the record.
- If the record type is configured in user mode, then none of the books on the record is a primary custom book, and the record ownership mode does not impact the workflow action.

If a workflow action has a dependency on the value in the Owner field on a record, such as when a Send Email action is configured to send email using the Relative User on Record option, then the following happens:

- If the record type is configured in book mode, then the workflow action fails.
- If the record type is configured in user mode or mixed mode, and the field that identifies the relative user on the record is blank, then the workflow action fails.

  For example, if you configure a Send Email action to send email to an account owner and the Account record type is configured in mixed mode, then the workflow action fails if the Owner field on the account record is blank. However, if the Owner field is populated, then the workflow action succeeds.

Latency

Workflow rules with any trigger event other than the Scheduled Event trigger event are evaluated in sequence and synchronously. The overall update operation is not completed until all the rules are evaluated. Therefore, the workflow rules add a certain amount of latency to operations (that is, the time between the start of an operation and its completion). For example, each task created by a workflow rule can add as much as 20% latency to a record update operation. Each email created by a workflow rule adds about 5% latency.

Expressions take less time to evaluate. To minimize latency, add mutually exclusive expressions to your workflow conditions. Build your workflow rules incrementally, keeping performance in mind.

Click a topic to see step-by-step procedures to do the following:

- Creating Workflow Rules (on page 1511)
- Creating Scheduled Events (on page 1517)
- Creating Workflow Actions: Assign a Book (on page 1529)
- Creating Workflow Actions: Create Integration Event (on page 1531)
- Creating Workflow Actions: Create Task (on page 1534)
- Creating Workflow Actions: Send Email (on page 1538)
- Creating Workflow Actions: Update Values (on page 1543)
- Creating Workflow Actions: Wait (on page 1545)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Changing the Order of Workflow Rules (on page 1548)
- Deactivating Workflow Rules and Actions (on page 1549)
- Deleting Workflow Rules and Actions (on page 1550)

About Association and Dissociation Trigger Events

Association and dissociation trigger events on workflow rules are supported for associations between certain record types only. The following actions are available for association and dissociation trigger events:

- **Send Email.** This action is available for all association and dissociation trigger events.
- **Wait.** This action is available for all association and dissociation trigger events.
- **Create Integration Event.** This action is available for some associations and dissociations only.

The following table lists the associations that support association and dissociation trigger events and indicates which of the associations and dissociations support the Create Integration Event action.

Parent Record Type	Record Type	Create Integration Event Action Supported
Account	Address	Yes
Account	Contact	Yes
Account	Custom Object 01	No
Account	Custom Object 02	No
Account	Custom Object 03	No
Activity	Contact	No
Contact	Account	Yes
Contact	Address	Yes
Contact	Custom Object 01	No
Contact	Custom Object 02	No
Contact	Custom Object 03	No
Contact	Opportunity	Yes
Opportunity	Contact	Yes
Opportunity	Custom Object 02	No

The following table lists the actions that can trigger an association or dissociation workflow rule. It also shows the integration events that are generated by the workflow rule in each case (if an integration event action is configured on the workflow rule).

NOTE: Depending on the data in the records, additional integration events can be generated. For example, if a new contact created on an account is the primary contact for the account, an additional (account update) integration event is generated.

Action	Parent Record	Child Record	Channel	Integration Event
Create a new account with an unshared address.	Account	Address	User Interface	Account: Insert Address: Insert Address: Associate
			Web Services	Account: Insert Address: Insert Address: Associate
Create an unshared address for an existing account.	Account	Address	User Interface	Address: Insert Account: Update Address: Associate
			Web Services	Address: Insert Account: Update Address: Associate
Remove an unshared address from an account.	Account	Address	User Interface	Address: Delete Account: Update
			Web Services	Address: Delete Account: Update Address: Dissociate
Create a new account with a related, existing shared address.	Account	Address	User Interface	Account: Insert
			Web Services	Account: Insert Account Address: Insert
Link an existing shared address to an existing account.	Account	Address	User Interface	Account Address: Insert
			Web Services	Account Address: Insert
Create a new shared address from the Address related information section of an account Detail page.	Account	Address	User Interface	Account: Update Address: Insert Address: Associate
			Web Services	Not Applicable

Action	Parent Record	Child Record	Channel	Integration Event
Remove a shared address from an account.	Account	Address	User Interface	Account Address: Delete Account: Update
			Web Services	Account Address: Delete
Create a new contact on an account.	Account	Contact	User Interface	Account: Update Contact : Insert Contact: Associate
			Web Services	Contact: Insert Contact: Associate Account: Update
Link an existing contact to an account.	Account	Contact	User Interface	Account Contact: Insert Contact: Update
			Web Services	Contact: Associate Account: Update
Remove a contact from an account.	Account	Contact	User Interface	Account Contact: Delete Contact: Update (primary contact only)
			Web Services	Contact: Dissociate Account: Update
Link an existing account to a contact.	Contact	Account	User Interface	Account Contact: Insert Account: Update
			Web Services	Account Contact: Insert Contact: Update
Remove an account from a contact.	Contact	Account	User Interface	Account Contact: Delete Contact: Update (primary contact only)
			Web Services	Account Contact: Delete Contact: Update (primary contact only)

Action	Parent Record	Child Record	Channel	Integration Event
Create a new contact with an unshared address.	Contact	Address	User Interface	Contact: Insert Address: Insert Address: Associate
			Web Services	Contact: Insert Address: Insert Address: Associate
Create an unshared address for an existing contact.	Contact	Address	User Interface	Address: Insert Contact: Update Address: Associate
			Web Services	Address: Insert Contact: Update Address: Associate
Remove an unshared address from a contact.	Contact	Address	User Interface	Address: Delete Contact: Update
			Web Services	Address: Delete Contact: Update Address: Dissociate
Create a new contact with a related existing shared address.	Contact	Address	User Interface	Contact: Insert
			Web Services	Contact: Insert Contact Address: Insert
Link an existing shared address to an existing contact.	Contact	Address	User Interface	Contact Address: Insert
			Web Services	Contact Address: Insert
Create a new shared address from the Address related information section of a contact Detail page.	Contact	Address	User Interface	Contact: Update Address: Insert Address: Associate
			Web Services	Not Applicable

Action	Parent Record	Child Record	Channel	Integration Event
Remove a shared address from a contact.	Contact	Address	User Interface	Contact Address: Delete Contact: Update
			Web Services	Contact Address: Delete
Create a new opportunity on a contact.	Contact	Opportunity	User Interface	Opportunity: Insert Opportunity: Associate
			Web Services	Opportunity: Insert Opportunity: Associate Contact: Update
Remove an opportunity from a contact.	Contact	Opportunity	User Interface	Opportunity: Dissociate
			Web Services	Opportunity: Dissociate
Create a new contact on an opportunity. **NOTE:** This action is not available through the user interface.	Opportunity	Contact	Web Services	Contact: Insert Contact: Associate
Link an existing contact to an opportunity.	Opportunity	Contact	User Interface	Opportunity: Update Opportunity Contact Role: Insert
			Web Services	Contact: Associate Opportunity: Update
Remove a contact from an opportunity.	Opportunity	Contact	User Interface	Opportunity Contact Role: Delete Opportunity: Update
			Web Services	Contact: Dissociate Opportunity: Update

About Workflow Actions

You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

You can create the following types of workflow actions:

- **Assign a Book.** The Assign a Book action assigns a book to a record when the conditions on the workflow rule are met.
- **Create Integration Event.** The Create Integration Event action sends an integration event to one or more integration queues when the conditions on the workflow rule are met and a change is detected in at least one of the fields that are tracked by the Create Integration Event action.
- **Create Task.** The Create Task action creates a task when the conditions on the workflow rule are met.
- **Send Email.** The Send Email action generates email when the conditions on the workflow rule are met. The email is automatically sent out, irrespective of whether the operation that triggered the workflow rule succeeds or fails.
- **Update Values.** The Update Values action updates fields when a record is changed, without losing the information about the original change (that is, information about when the record was changed, by whom, and what data was changed). The action is performed after the end of the wait period defined in one or more Wait actions that precede the Update Values action on the workflow rule.
- **Wait.** A Wait action causes Oracle CRM On Demand to delay the execution of other (following) actions on a workflow rule until after a wait period has passed.

  NOTE: The wait period specifies the minimum amount of time that must pass before Oracle CRM On Demand starts to execute the other actions on the workflow rule. The actual amount of time that passes before the other actions are executed might be longer, depending on the load on the Oracle CRM On Demand database and the Oracle CRM On Demand server, and also on the number of Wait actions that are pending when the wait period ends.

NOTE: If you specify more than one action for a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. After you have created the actions for the workflow rule, you can change the order of the actions. For more information, see Changing the Order of Workflow Rule Actions (on page 1548).

When creating actions for workflow rules, you use Expression Builder to select fields from records and to define expressions to calculate variables. You can merge the record fields and variables in the subject and message body text of an email, the subject and description text of a task, or the new value for a field that you want to update. You can also use Expression Builder to calculate the duration or the end date and time of a wait period in Wait actions on workflow rules. Field names and variables in the expressions you define are replaced by values when the workflow rules are implemented. For more information about Expression Builder, see Expression Builder (on page 1886).

NOTE: A *concatenated field* is a field that can display the values from multiple fields and can also display additional text. Concatenated fields cannot be updated through Update Values workflow actions, and cannot be included in integration events. Instead, you must use the individual fields that make up the concatenated fields.

For step-by-step procedures for creating workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 1529)
- Creating Workflow Actions: Create Integration Event (on page 1531)
- Creating Workflow Actions: Create Task (on page 1534)
- Creating Workflow Actions: Send Email (on page 1538)
- Creating Workflow Actions: Update Values (on page 1543)
- Creating Workflow Actions: Wait (on page 1545)

Additional Workflow Actions for Oracle CRM On Demand for Partner Relationship Management

Three additional workflow actions are available only in Oracle CRM On Demand for Partner Relationship Management:

- Sync Partner Books
- Sync Book Partner

- Sync Owner Partner

For more information on these actions and how you can use them, see *Oracle CRM On Demand for Partner Relationship Management Configuration Guide*, available from the Oracle CRM On Demand documentation library on Oracle Technology Network.

Additional Workflow Actions for Oracle CRM On Demand Life Sciences Edition

Two additional workflow actions are available for use in Oracle CRM On Demand Life Sciences Edition: Submit Call and Submit.

Submit Call Action

The Submit Call action must be set up by only by customers who use the Oracle CRM On Demand Disconnected Mobile Sales application to work with Oracle CRM On Demand Life Sciences Edition. For information on the procedure to configure this workflow action, see the information on configuring the disbursement transaction workflow rule for inventory tracking in *Oracle CRM On Demand Disconnected Mobile Sales Administration Guide,* which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network. Customers who do not use Oracle CRM On Demand Life Sciences Edition must not configure this workflow action. If they do configure this workflow action, then Activity records might be created, and the records might be set to the Submitted status and listed under Completed Activities without being in the Open state.

The Submit Call action is available for the following trigger events:

- When New Record Saved
- When Modified Record Saved

The Submit Call action must be followed by the Wait action.

Submit Action

The Submit action is available only in workflow rules for the Sample Transaction record type. The Submit action automatically submits a sample transaction record for processing by Oracle CRM On Demand and is equivalent to clicking the Submit button on a Sample Transaction Detail page in the user interface. For information about how you might use the Submit workflow action, see Setting Up the Automatic Submission of Sample Transactions (on page 1882).

The Submit action is available for the When Modified Record Saved trigger event. The Submit action must be preceded by the Wait action.

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 1491)
- About Time-Based Workflow Rules (on page 1502)
- Creating Workflow Rules (on page 1511)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Deactivating Workflow Rules and Actions (on page 1549)
- Deleting Workflow Rules and Actions (on page 1550)

About Time-Based Workflow Rules

You can configure certain workflow rules so that actions are performed after a wait period has passed. For example, you can configure a rule so that an action on the rule is performed after the due date of a record has passed, or if a record has not been worked on for some time. There are two ways to configure time-based workflow rules:

- By configuring scheduled events. A scheduled event is a workflow rule that is not triggered by a user action. Instead, the scheduled event is automatically executed when a specified date and time is reached. You can optionally configure a scheduled event to be executed multiple times, at an interval that you specify on the scheduled event. The workflow actions on a scheduled event are performed on a list of records, whereas the actions on other types of workflow rules are performed on a single record.

For more information about scheduled events, see About Scheduled Events (on page 1515) and Creating Scheduled Events (on page 1517).

- By configuring Wait actions on a workflow rule or scheduled event.

About Wait Actions

You can add one or more Wait actions to certain post-event workflow rules, including scheduled events. In each case where you want a time-based action to be performed, you create a Wait action that specifies the period of time for the delay, or the end-date and time of the delay. You can specify periods of time or dates directly, or you can create an expression to calculate the period or date. You then order the actions on the rule so that the Wait action comes immediately before the action that you want to delay. If more than one rule is required to fulfill a business process, you order the rules appropriately to achieve your objective.

NOTE: You cannot configure Wait actions on pre-event workflow rules.

About Reevaluating Workflow Conditions After Wait Actions

When you set up a Wait action on a post-event workflow rule with any trigger event other than Scheduled Event, you can specify if the workflow rule condition is to be reevaluated when the wait period ends. If the Reevaluate Rule Conditions After Wait check box on the Wait action is selected, then after the wait period ends the record is reread and reevaluated against the condition on the workflow rule.

If the rule condition is not met (because the record has been changed during the wait period), the remaining actions on the rule are not performed. By default, the Reevaluate Rule Conditions After Wait check box is selected on Wait actions.

If you deselect the Reevaluate Rule Conditions After Wait check box on a Wait action, then after the wait period ends the record is reread and the next action on the rule is performed without checking that the record still meets the rule condition. If you have more than one Wait action on a rule, the Reevaluate Rule Conditions After Wait check box must be selected on each Wait action where you want the rule condition to be reevaluated after the wait period ends.

NOTE: You cannot configure a condition on a scheduled event, that is, a workflow rule with the Scheduled Event trigger event. Therefore, selecting or deselecting the Reevaluate Rule Conditions After Wait check box on a Wait action on a scheduled event has no effect on the processing of the rule.

Example of Using Time-Based Workflow Rules Using Wait Actions

The following is an example of how you might configure time-based workflow rules using Wait actions. You might use time-based workflow rules differently, depending on your business model.

Three priority options are used for service requests: Standard, Urgent, and Critical. The priority of a service request is set to Standard by default when the service request is created. A business process for service escalation requires the following actions:

1. After a new service request is created, and if the status of the service request is not updated within 24 hours, the priority of the service request is changed to Urgent and an email is sent to the owner of the service request to notify the owner that the service request must be updated.
2. If another 24 hours pass without a change to the status of the service request, the following happens:
   - The Priority field on the service request is changed to Critical
   - The service request is reassigned to the original owner’s manager
   - An email is sent to the original owner of the service request and to the new owner to tell them that the service request has been reassigned to the owner's manager and the Priority has been changed to Critical

To meet this requirement, the company administrator sets up a workflow rule for the service request record type, which is configured as follows:

1. The rule trigger is set to the following value: When New Record Saved.
2. The rule condition specifies that the status of the service request is not set to Pending, as follows:

   ```
   [<Status>]<>LookupValue("SR_STATUS", "Pending")
   ```

3. The following sequence of actions is on the workflow rule:
   a. A Wait action with a duration of 24 hours, with the Reevaluate Rule Conditions After Wait check box selected
   b. An Update Values action to change the Priority field on the service request to Urgent
   c. A Send Email action to send email to the owner of the service request to notify the owner that the priority of the service request has changed to Urgent and the service request must be updated
   d. A Wait action with a duration of 24 hours, with the Reevaluate Rule Conditions After Wait check box selected
   e. An Update Values action to change the Priority field on the service request to Critical
   f. An Update Values action to assign the original owner's manager as the new owner
   g. A Send Email action to send email to the owner of the service request and to the owner's manager to notify them that the service request has been reassigned and the priority of the service request has changed to Critical

For information about creating Wait actions and Update Values actions on workflow rules and on scheduled events, see Creating Workflow Actions: Wait (on page 1545) and Creating Workflow Actions: Update Values (on page 1543).

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 1491)
- About Workflow Actions (on page 1500)
- Creating Workflow Rules (on page 1511)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Deactivating Workflow Rules and Actions (on page 1549)
- Deleting Workflow Rules and Actions (on page 1550)

About Workflow Rule and Workflow Action Failures

The behavior that you see when a workflow rule or a workflow rule action fails depends on the following:

- Whether the workflow rule is a pre-event rule, a post-event rule, or a scheduled event. This is determined by the trigger event on the workflow rule. For more information about trigger events, see About Workflow Rules (on page 1491).
- The type of error that causes the workflow rule or action to fail.

The following are some examples of errors that can cause a workflow rule or a workflow action to fail:

- A syntax error in an expression in a workflow rule condition or in a workflow action. Some syntax errors cannot be found by Expression Builder when a workflow rule or action is created.

- A semantic error in an expression in a workflow rule condition or in a workflow action. The following are examples of semantic errors that can occur:
  - A field in the expression cannot be identified by Oracle CRM On Demand because the integration tag for the field was changed after the workflow rule or workflow action was created.
  - An invalid value is specified for a picklist field in the expression.

Post-Event Workflow Rule and Workflow Action Failures

The following table describes the outcome for errors that occur in post-event workflow rules and the workflow actions on those rules.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
Syntax error in a workflow rule condition	■ None of the actions on the workflow rule are performed. ■ The failure is reported in the Workflow Error Monitor. ■ None of the workflow rules configured for the same record type and trigger event are triggered. ■ The operation that triggered the workflow rule is not affected by the failure of the rule.	Details of the workflow rule on which the error was found, along with details of the error.
Syntax error in a workflow action	■ The workflow action fails. ■ The failure is reported in the Workflow Error Monitor. ■ If other actions exist on the workflow rule, then those actions are performed. ■ If any other workflow rules exist for the same record type and trigger event, then those rules are triggered and the actions on those rules are performed. ■ The operation that triggered the workflow rule is not affected by the failure of the workflow action.	Details of the workflow action on which the error was found, along with details of the error.
Semantic error in a workflow rule condition	■ None of the actions on the workflow rule are performed. ■ The failure is reported in the Workflow Error Monitor. ■ If any other workflow rules exist for the same record type and trigger event, then those rules are triggered and the actions on those rules are performed. ■ The operation that triggered the workflow rule is not affected by the failure of the rule.	Details of the workflow rule on which the error was found, along with details of the error.
Semantic error in a workflow action	■ The workflow action fails. ■ The failure is reported in the Workflow Error Monitor. ■ If other actions exist on the workflow rule, then those actions are performed.	Details of the workflow action on which the error was found, along with details of the error.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
	■ If any other workflow rules exist for the same record type and trigger event, then those rules are triggered and the actions on those rules are performed. ■ The operation that triggered the workflow rule is not affected by the failure of the workflow action.	
Any other error in a workflow action	■ The workflow action fails. ■ The failure is reported in the Workflow Error Monitor. ■ If other actions exist on the workflow rule, then those actions are performed. ■ If any other workflow rules exist for the same record type and trigger event, then those rules are triggered and the actions on those rules are performed. ■ The operation that triggered the workflow rule is not affected by the failure of the workflow action.	Details of the workflow action that failed, along with details of the error.

Pre-Event Workflow Rule and Workflow Action Failures

The following table describes the outcome for errors that occur in pre-event workflow rules and the workflow actions on those rules.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
Syntax error in a workflow rule condition or a workflow action	■ None of the actions on the workflow rule are performed. ■ The failure is reported in the Workflow Error Monitor. ■ None of the workflow rules configured for the same record type and trigger event are triggered. ■ The operation that triggered the workflow rule is not affected by the failure of the rule.	Details of the workflow rule or the workflow action that contains the first syntax error that was encountered, along with details of the error.
Semantic error in a workflow rule condition	■ None of the actions on the workflow rule are performed. ■ The failure is reported in the Workflow Error Monitor. ■ If the rule was triggered by a delete operation, then the record is deleted. ■ If the rule was triggered by an update operation, then the updated record is saved, unless the Cancel Save check box is selected on the workflow rule. If the Cancel Save check box is selected on the workflow rule, then the update	Details of the workflow rule on which the error was found, along with details of the error.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
	operation that triggered the workflow rule is canceled in the same way that an update operation is canceled if the condition on the rule is not met. For details of what happens when an update operation is canceled by the workflow Cancel Save functionality, see Canceling Workflow Save Operations (on page 1525).	
Semantic error in a workflow action	■ If any Update Values actions or Create Integration Event actions on the workflow rule were already performed, then those actions are rolled back. Any remaining actions on the workflow rule are not performed. **NOTE:** If any Create Task actions or Send Email actions were already performed, then those actions are not rolled back. ■ The error is reported back to the user whose action triggered the workflow rule. If the workflow rule was triggered by a Web service, then the failure of the workflow action is reported in the response to the Web service. ■ The operation that triggered the rule is blocked.	Not applicable
Any other error in a workflow action	■ None of the remaining actions on the workflow rule are performed. ■ The error is reported back to the user whose action triggered the workflow rule. If the workflow rule was triggered by a Web service, then the failure of the workflow action is reported in the response to the Web service. ■ The operation that triggered the rule is blocked.	Not applicable

Scheduled Event and Workflow Action Failures

The following table describes the outcome for errors that occur in scheduled events and the workflow actions on those scheduled events for record types other than Analytics.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
Syntax error in a workflow action	■ The workflow action fails for each record in the list. ■ An instance is reported in the Workflow Error Monitor for each failure.	Details of the workflow action that contains the syntax error that was

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
	■ If other actions exist on the scheduled event, then those actions are performed. ■ The failure of the workflow action does not prevent the generation of a pending instance for the next scheduled occurrence of the event.	encountered, along with details of the error.
Semantic error in a workflow action	■ The workflow action fails for each record in the list. ■ An instance is reported in the Workflow Error Monitor for each failure. ■ If other actions exist on the scheduled event, then those actions are performed. ■ The failure of the workflow action does not prevent the generation of a pending instance for the next scheduled occurrence of the event.	Details of the workflow action on which the error was found, along with details of the error.
The number of records returned in the list specified on the scheduled event exceeds the maximum number allowed.	■ None of the actions on the scheduled event are performed for any record in the list. ■ The failure is reported in the Workflow Error Monitor. A single instance is reported. ■ The failure does not prevent the generation of a pending instance for the next scheduled occurrence of the event.	Details of the scheduled event that failed, along with details of the error.
The user who made the scheduled event active does not have access to the list specified on the scheduled event.	■ None of the actions on the scheduled event are performed for any record in the list. ■ The failure is reported in the Workflow Error Monitor. A single instance is reported. ■ The failure does not prevent the generation of a pending instance for the next scheduled occurrence of the event.	Details of the scheduled event that failed, along with details of the error.
Any other error in a workflow action	■ The workflow action fails for each record in the list. ■ An instance is reported in the Workflow Error Monitor for each failure. ■ If other actions exist on the scheduled event, then those actions are performed. ■ The failure of the workflow action does not prevent the generation of a pending instance for the next scheduled occurrence of the event.	Details of the workflow action that failed, along with details of the error.

NOTE: After an instance of a scheduled event fails, another instance is generated for the next scheduled occurrence of the event. You cannot resubmit a failed instance.

Scheduled Event and Workflow Action Failures for the Analytics Record Type

The following table describes the outcome for errors that can occur for scheduled events for the Analytics record type and the workflow actions on those scheduled events. In all of the cases listed in the table, the failure of a workflow action for one or more users does not prevent the generation of a pending instance for the next scheduled occurrence of the event.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
Syntax error in a workflow action	- For each user in the list of users on the scheduled event, the workflow action fails, and no email is sent to the user. - An instance is reported in the Workflow Error Monitor for each failure. - If other actions exist on the scheduled event, then those actions are performed.	Details of the workflow action that contains the syntax error that was encountered, along with details of the error.
Semantic error in a workflow action	- For each user in the list of users on the scheduled event, the workflow action fails, and no email is sent to the user. - An instance is reported in the Workflow Error Monitor for each failure. - If other actions exist on the scheduled event, then those actions are performed.	Details of the workflow action on which the error was found, along with details of the error.
One or more of the following issues arises at the time that Oracle CRM On Demand attempts to perform an action on behalf of a user: - ETL (extract, transform, load) is running. - The Analytics server is down. - One or more of the report services allotments is exceeded, or the file allotment for your company is reached.	- The workflow action fails. - None of the remaining actions on the event are performed for the user, and none of the actions are performed for any of the remaining users in the list. - If any action on the event instance was successfully performed for a user before the issue arose, then the email with the results is sent to that user. - An instance is reported in the Workflow Error Monitor for the failure.	Details of the workflow action that failed, along with details of the error.

Type of Error	Outcome	What is Reported in the Workflow Error Monitor
One or more of the following issues is found when Oracle CRM On Demand attempts to perform an action on behalf of a user: - The user's role does not have the Access V3 Analytics privilege. - The user is inactive. - Oracle CRM On Demand cannot sign in to the Analytics server on the user's behalf.	- None of the workflow actions on the event are performed for the user. - The failure does not prevent the action from being performed for other users in the list of users on the scheduled event. - An instance is reported in the Workflow Error Monitor for the failure.	Details of the workflow action that failed, along with details of the error.
One or more of the following issues is found when Oracle CRM On Demand attempts to perform a workflow action on behalf of a user: - The Analytics object selected on the action is no longer available. - The Analytics object selected on the action is an analysis, and that analysis fails to execute. **NOTE:** If a dashboard or dashboard page is selected on the action, and if an analysis in the dashboard or dashboard page fails to execute, this does not cause the workflow action to fail. - The file that is generated by the action exceeds the maximum allowed size of 20 MB. - The user does not have access to the Analytics object.	- The workflow action fails for the user. - If other actions exist on the scheduled event, then those actions are performed for the user. - An instance is reported in the Workflow Error Monitor for the failure.	Details of the workflow action that failed, along with details of the error.
An analysis executed by a Send Email action on a scheduled event returns no results for a given user, and the Send Email if No Results check box on the Send Email action is deselected.	- No email is sent to the user. - If other actions exist on the scheduled event, then those actions are performed for the user. - If the analysis returns results for other users on the scheduled event, then the email and the results of the analysis are sent to those users. - An instance is reported in the Workflow Error Monitor for the failure.	The name and folder path of the analysis and the name of the user for whom no results were returned.

Considerations When Creating Workflow Rules for the User Record Type

The following considerations apply when you create workflow rules for the User record type:

- To create workflow rules for the User record type, you must have both of the following privileges enabled in your user role:
  - Manage Data Rules - Manage Workflow Rule
  - Manage Data Rules - Manage Workflow Rules for Users
- Workflow rules for the User record type are not triggered in the following cases:
  - When changes are made to a user record by Oracle CRM On Demand Customer Care at the request of your company.

    NOTE: Users can grant sign-in access to Oracle CRM On Demand technical support representatives for troubleshooting purposes. If a technical support representative makes a change to a user record while signed in as a user, then that change is treated as if it was made by the user that the technical support representative is impersonating, and the change triggers any relevant workflow rules.
  - When a user's password is reset by the administrator clicking Reset Password on the user's record.

    NOTE: If the administrator selects the Email Temporary Password When I Click Save check box on the user record, then this action is considered to be an update to the user record, and the change triggers any relevant workflow rules.
  - When a user's password is reset through Web services.
  - When a user sets up her password after signing in to Oracle CRM On Demand for the first time.
  - When a user changes his password.
  - When a user sets up her security questions after signing in to Oracle CRM On Demand for the first time.
  - When a user changes his security questions.
  - When a change is made to a sales quota on a user record.
- The Assign a Book workflow action is not supported for workflow rules for the User record type. This is because custom books are not assigned to user records in the same way that they are assigned to other record types such as accounts, contacts, and so on. Although users can be associated with books to give users access to the records in the books, only the user's default user book is assigned to the user record.
- You cannot use an Update Values workflow action to update the Status field on a user record.
- If a workflow rule for the User record type has an Update Values action, and if the workflow rule is triggered by a change that is made to the user record through the My Setup link, then the Update Values action does not update any fields that are read-only for the user.
- When you create a Send Email workflow action for the User record type, the Specific Email Address option is not available in the To field. Only the Specific User and Relative User on Record options are available. For the Relative User on Record option, you can select one of the following options:
  - **Current User.** This is the user whose action triggered the workflow rule.
  - **Supervisor.** This is the user who is named in the Supervisor field on the user record that was created or updated by the action that triggered the workflow rule.
  - **Reports To.** This is the user who is named in the Reports To field on the user record that was created or updated by the action that triggered the workflow rule.

  Similarly, when you create a Create Task workflow action for the User record type, the options that are available for the Relative User on Record option in the Owner field are Current User, Supervisor, and Reports To.

Creating Workflow Rules

This topic describes how to create workflow rules with any trigger event other than Scheduled Event. For information about creating workflow rules with the Scheduled Event trigger event, see Creating Scheduled Events (on page 1517).

NOTE: If the Enable Language Translation Support for Workflow Cancel Save Message check box is selected on the company profile, then the Translation Language field is available in the Workflow Rule Detail page and in the

Workflow Rule Edit page when you edit an existing workflow rule. The Translation Language field allows you to enter translated versions of the custom error messages that are returned to users or Web services if the condition on a workflow rule is not met and the Cancel Save check box is selected for the rule. For more information about the Translation Language field, see Canceling Workflow Save Operations (on page 1525).

Before you begin. Workflow functionality in Oracle CRM On Demand must be set up for your company, as described in About Workflow Rules (on page 1491). To perform the procedures described in this topic, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. To create workflow rules for the User record type, you must also have the Manage Data Rules - Manage Workflow Rules for Users privilege in your user role. Your administrator can enable this privilege for the Administrator role and for any other role as necessary. For more information about considerations when creating workflow rules for the User record type, see Considerations When Creating Workflow Rules for the User Record Type (on page 1510). For information about adding privileges to roles, see Adding Roles (on page 1396).

NOTE: After a rule is created, you cannot change the record type or trigger event on the rule. However, you can update the workflow condition.

To create a workflow rule

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, do one of the following:
   - To create a new workflow rule by copying an existing one, click Copy on the workflow rule that you want to copy.
   - To create a new workflow rule that is not based on an existing rule, click New on the title bar.

   NOTE: If you sort a list of workflow rules by record type, then the rules are sorted by the system name of the record type. As an example, the system name of the Address record type (SharedAddress) starts with the letter S, and workflow rules for the Address record type are sorted accordingly.
4. In the Workflow Rule Detail page, in the Key Workflow Rule Details section, fill in the rule information.

   The following table describes the rule fields.

Field	Description
Workflow Name	Enter a unique name, up to 50 characters.
Active	Use the Active check box to enable and disable the rule. Any number of workflow rules can be active at the same time.
Order	This field is read-only when you create the workflow rule. It determines the order in which Oracle CRM On Demand invokes the rules that are based on the same record type and the same trigger event, and where applicable, the same parent record type. Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules based on the same record type and the same trigger event. If the trigger event for the workflow rule is After Association With Parent or After Dissociation From Parent, then Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules based on the same record type, the same trigger event, and the same parent record type. Later, you can change the order of the workflow rules. For more information, see Changing the Order of Workflow Rules (on page 1548).

Field	Description
Exit	If you select the Exit check box on this workflow rule, and if the condition on the rule is met, then the active actions on this workflow rule are performed. However, none of the subsequent workflow rules that are based on the same record type and the same trigger event, and where applicable, the same parent record type, are triggered. If the condition on this workflow rule is not met, then Oracle CRM On Demand proceeds to the next rule in the sequence, regardless of the setting of the Exit check box on this workflow rule.
Description	(Optional) Enter additional information about the workflow rule, such as the purpose of the rule.
Record Type	Select the record type for the workflow rule. For create, update, and delete trigger events, each workflow rule relates to one record type only. The rule is evaluated for that type of record and the actions are performed on that type of record. After a rule is created, you cannot change the record type on the rule. For workflow rules where the trigger event is After Association With Parent trigger event or After Dissociation From Parent, select the record type of the child record. For example, if you want the workflow rule to be triggered when a contact record is associated with an account record, select Contact in this field, and select Account in the Parent Record Type field.
Trigger Event	Select the event that triggers the rule. When this event occurs on a record of the specified type, the rule is evaluated. After a rule is created, you cannot change the trigger event on the rule. **NOTE:** The trigger events After Association With Parent and After Dissociation From Parent are supported only for the Account, Contact, and Opportunity record types. For more information, see About Association and Dissociation Trigger Events (on page 1496).
Parent Record Type	This field is displayed if you select the After Association With Parent trigger event or the After Dissociation From Parent trigger event. Select the parent record type. For example, if you are setting up a workflow rule that will be triggered when a contact record is associated with a parent account record, select Account in this field, and select Contact in the Record Type field.

5 If you want to define a condition on the workflow rule, click the *fx* icon in the Workflow Rule Condition section of the page, and use Expression Builder to define the workflow rule condition. For more information about Expression Builder, see Expression Builder (on page 1886).

NOTE: If you do not define any condition for the workflow rule, the actions on the rule will be performed each time the rule is triggered.

When creating conditions on workflow rules, note the following points:

- A workflow rule condition can contain a maximum of 2048 characters.

- You can configure workflow rules that are specific to particular roles or channels. For more information about restricting workflow rules to specific roles or channels, see Restricting Workflow Rules to Specific Channels or Roles (on page 1528).
- You can determine if a field in a record has been updated by using a condition similar to the following in the workflow rule. In this example, the string used to determine if the field has changed is *Invalid*, but you can use any string you want, provided that the string does not exist as a value in the field that is being examined:

  ```
  IfNull([<FieldName>], "Invalid") <> IfNull(PRE("<FieldName>"), "Invalid")
  ```

  CAUTION: The PRE function does not return the previous value of a field if the function is used in any workflow or action that is invoked after a Wait action. For more information about the PRE() function, see PRE (on page 1924).

6. If the Actions If Condition Is False section is available on the Workflow Rule Detail page, then you can specify that the save operation must be cancelled if the condition on the rule is not met.

   For more information about specifying that the save operation must be cancelled if the condition on the rule is not met, see Canceling Workflow Save Operations (on page 1525).
7. Save the workflow rule.

When you have saved the rule, you can create actions for the rule. You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

For step-by-step procedures for creating workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 1529)
- Creating Workflow Actions: Create Integration Event (on page 1531)
- Creating Workflow Actions: Create Task (on page 1534)
- Creating Workflow Actions: Send Email (on page 1538)
- Creating Workflow Actions: Update Values (on page 1543)
- Creating Workflow Actions: Wait (on page 1545)

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 1491)
- About Workflow Actions (on page 1500)
- Creating Scheduled Events (on page 1517)
- Canceling Workflow Save Operations (on page 1525)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Changing the Order of Workflow Rules (on page 1548)
- Deactivating Workflow Rules and Actions (on page 1549)
- Deleting Workflow Rules and Actions (on page 1550)

About Scheduled Events

A scheduled event is a workflow rule that is not triggered by a user action. Instead, the scheduled event is automatically executed when a specified date and time is reached. You can optionally configure a scheduled event to be executed multiple times, at an interval that you specify on the scheduled event. The workflow actions on a scheduled event are performed on a list of records, whereas the actions on other types of workflow rules are performed on a single record.

NOTE: The trigger event for a scheduled event is Scheduled Event.

You can create scheduled events for all of the top-level record types that support list management features, and for the Price List, Product, Product Category, and User record types.

NOTE: You can also create scheduled events for the Analytics record type. The workflow actions on scheduled events for the Analytics record type are not performed on a list of records. Instead, these actions execute an analysis, dashboard, or dashboard page on behalf of specified users and send the results to those users. For more information about scheduled events for the Analytics record type, see Creating Scheduled Events for Analytics (on page 1521).

When you create a scheduled event for any record type other than the Analytics record type, you select a filtered list that returns the records for which you want the workflow actions to be performed. Each time that the scheduled event is executed, the actions are performed for the records that are returned by the filtered list on that date. The records are processed in sequence, that is, all of the workflow actions on the scheduled event are performed in the order specified on the scheduled event for the first record in the list, then all of the actions are performed for the second record in the list, and so on.

As an example, you might want Oracle CRM On Demand to send an email reminder to the owners of open activities for which the due date has passed, and you want this action to be repeated at intervals of one week. To set this up, you create a scheduled event on which you select a previously defined list that returns all open activities for which the due date has already passed. You configure the scheduled event to repeat at intervals of one week, and then create a Send Email action on the scheduled event. The first instance of the scheduled event is executed on the start date that you specified, and an email reminder is sent to the owner of each open activity for which the due date has passed. The scheduled event is then automatically executed again at intervals of one week until the end date that you specified is reached (or the event has been executed the number of times that you specified).

NOTE: You can create up to a maximum of 5 workflow actions on a scheduled event. On all other types of workflow rules, you can create up to a maximum of 25 workflow actions.

Occurrences of scheduled events are scheduled and executed as follows:

- After you make a scheduled event active, a pending instance is generated for the first scheduled occurrence of the event, and the status of the scheduled event is set to Scheduled. The pending instance is shown in the Workflow Wait Monitor. For information about the fields that are displayed for a pending instance, see Workflow Pending Instance Fields (on page 1560).

  NOTE: The Resume Date on a pending instance of a scheduled event is the earliest possible time that the instance will be executed. Depending on the load on the Oracle CRM On Demand database and on the Oracle CRM On Demand server at that time, the instance might not be executed immediately.

  A pending instance is generated for the first scheduled occurrence of the scheduled event even if workflow is not enabled (that is, the Enable Workflow check box on the company profile is not selected) at the time that a scheduled event is made active. However, if workflow is not enabled when the resume date for the instance arrives, then the following happens:

  - None of the workflow actions that are configured on the event are performed.
  - If an error occurs that would cause the scheduled event instance to fail (for example, if the list of records exceeds the allowed limit), then the failure is report in the Workflow Error Monitor. Otherwise, the error monitor does not report a failure for the instance.

  - Another pending instance is created for the next scheduled occurrence of the event.
  - If the Enable Notification check box is selected on the scheduled event, then an email is sent to the user who made the scheduled event active. If an error was found that would cause the scheduled event instance to fail, then the email indicates that the instance completed with errors, otherwise, the email indicates that the instance completed successfully.

  The same behavior applies for each instance of the scheduled event until workflow is enabled.

- After an instance of the scheduled event is executed, the following happens:
  - If the Enable Notification check box is selected on the scheduled event, then Oracle CRM On Demand sends an email to the user who made the scheduled event active, to confirm that the instance has been executed.
  - Another instance is generated for the next scheduled occurrence of the event.
- When all instances of the scheduled event have completed, the scheduled event is deactivated (that is, the Active check box on the scheduled event is automatically deselected) and the status of the scheduled event is set to Completed.

Scheduled Event Status

The Status field on a scheduled event is updated automatically and is read-only. The following values can appear in the Status field:

- **Not Scheduled.** The scheduled event has never been made active.
- **Scheduled**. The scheduled event is active and a pending instance of the event exists.
- **Completed.** All of the scheduled occurrences of the scheduled event have completed.
- **Terminated.** The most recently generated instance of the scheduled event was deleted from the Workflow Wait Monitor, or the scheduled event was deactivated.

  For more information about what happens when you delete an instance of a scheduled event from the Workflow Wait Monitor, see Deleting Pending Instances from the Workflow Wait Monitor (on page 1559).

About Deleting Scheduled Events

If you delete a scheduled event before all of the scheduled occurrences of the event have been executed, then the following happens:

- If a pending instance of the scheduled event exists, then the instance is deleted from the Workflow Wait Monitor.
- If an instance of the scheduled event is currently being executed, then the instance fails. The failure is not reported in the Workflow Error Monitor.
- No further instances of the scheduled event are generated.

About Deactivating Scheduled Events

If you deactivate a scheduled event before all of the scheduled occurrences of the event have been executed, then the following happens:

- The status of the scheduled event is set to Terminated.
- If a pending instance of the scheduled event exists, then the instance is deleted from the Workflow Wait Monitor.
- If an instance of the scheduled event is currently being executed, then some of the actions might fail.

  During the time that an instance of a scheduled event is being executed, Oracle CRM On Demand checks at five-minute intervals to determine if the scheduled event is still active. If the scheduled event has been deactivated, then the instance terminates. Any action that has not already been performed fails, and the error instances for the failed actions are reported in the error monitor.

- No further instances of the scheduled event are generated.

If you select the Active check box on a scheduled event record that was previously deactivated, then the scheduled event record is treated as a new scheduled event. Depending on the schedule, one of the following happens:

- **If future occurrences are scheduled.** The status of the scheduled event is set to Scheduled and a pending instance is generated for the next scheduled occurrence. The count of occurrences of the scheduled event is reset to 1 when the instance is generated.
- **If no future occurrences are scheduled.** The Active check box on the scheduled event is automatically deselected again and the status of the scheduled event is set to Completed.

The maximum number of active scheduled events that is supported for an instance of Oracle CRM On Demand is 100.

Best Practices

The following are some best practice tips for managing your scheduled events:

- Keep the number of active scheduled events to as few as possible. Having too many active scheduled events can affect the performance of the workflow actions on the events.
- Keep the number of records in the list for a scheduled event to as few as possible. Although a scheduled event can process up to a maximum of 1000 records in a list, the performance of the workflow actions on the events is better if the list is filtered to contain fewer records.
- Set up your scheduled events so that they execute at different times. Performance can be affected if you schedule multiple events to execute at the same time.

For information about creating scheduled events, see Creating Scheduled Events (on page 1517) and Creating Scheduled Events for Analytics (on page 1521).

Creating Scheduled Events

This topic describes how to create scheduled events, that is, workflow rules with the Scheduled Event trigger event. For information about creating workflow rules with any other trigger event, see Creating Workflow Rules (on page 1511).

NOTE: The procedure for creating a scheduled event for the Analytics record type is different from the procedure for creating a scheduled event for other record types. For information about creating scheduled events for the Analytics record type, see Creating Scheduled Events for Analytics (on page 1521).

The following considerations apply when scheduling an event:

- You cannot specify a condition on a scheduled event. The scheduled instances of the event and the workflow actions on the event are always executed unless an error occurs.

  NOTE: After the Scheduled Event trigger event is selected in the Workflow Rule New page, the page refreshes. The Workflow Rule Condition section of the page is removed and the Schedule Details section, where you specify the schedule for the event, becomes available.

- For performance reasons, it is recommended that you avoid configuring multiple scheduled events that are scheduled to execute at the same time.
- You must specify a start date and time for the scheduled event and you must specify either an end date and time, or the number of times the event is to be executed.

  NOTE: Oracle CRM On Demand does not generate any instances for dates and times in the past even if you specify a start date and time that is in the past. For example, if you specify a start date of January 15, 2018 for a scheduled event that is to repeat 10 times at intervals of one month, and if the current date is May 30, 2018, then the first instance of the event is scheduled for June 15, 2018. Only the instances for the five occurrences in the future will be executed.

- If you specify that the scheduled event is to be executed on a certain date in the month, and if that date does not occur in a given month, then the event will not be executed in that month. For example, if you select day 29 in the month, then the event will not be executed in February, unless the year is a leap year.

The following considerations apply when selecting a list for a scheduled event:

- You cannot make the scheduled event active if you do not have access to the filtered list that is selected on the scheduled event.
- If the user who makes the scheduled event active does not have access to the list that is selected on the scheduled event at the time when an instance of the event is executed, then the instance fails.
- When an instance of the scheduled event is executed, the list that is returned includes only those records that meet the list filter criteria and are visible to the user who made the scheduled event active.
- The maximum number of records that can be processed by an instance of a scheduled event is 1000. If the list that you select on the scheduled event returns more than the maximum number allowed when an instance of the event is executed, then the instance fails. To avoid this issue, make sure that the filter on the list that you select for the scheduled event is set up in such a way that it is not likely to return a very large list of records.
- When specifying the filter for a list that you want to use for scheduled events, you can use one or more of the following functions in Date and Date/Time fields:
  - Duration()
  - Timestamp()
  - Today()

  You can use these functions with the following conditions:
  - Between
  - Equal to
  - On
  - On or after
  - On or before
  - Not Between
  - Not equal to

  You can type the expression containing the functions directly into the filter value field in the list criteria. For example, to return opportunity records where the Close Date is two days later than the current date (that is, the date when the scheduled event is executed), select the Equal to condition and enter the following expression:

  Today() + 2

  As another example, to return lead records where the Estimated Close Date is within the next 36 hours, select the Between condition and enter the following expression:

  Timestamp(), Timestamp() + Duration('P0YT36H')

  For more information about these functions, see the following topics: Duration (on page 1902), Timestamp (on page 1928), and Today (on page 1931).

Before you begin:

- Workflow functionality in Oracle CRM On Demand must be set up for your company, as described in About Setting Up Workflow Rules Functionality (on page 1490).
- To perform the procedures described in this topic, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role.
- To create scheduled events for the User record type, you must also have the Manage Data Rules - Manage Workflow Rules for Users privilege in your user role. Your administrator can enable this privilege for the Administrator role and for any other role as necessary. For more information about considerations when creating scheduled events for the User record type, see Considerations When Creating Workflow Rules for

the User Record Type (on page 1510). For information about adding privileges to roles, see Adding Roles (on page 1396).

- Review the information in About Scheduled Events (on page 1515).

To create a scheduled event

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, do one of the following:
   - To create a new scheduled event by copying an existing one, click Copy on the scheduled event that you want to copy.
   - To create a new scheduled event that is not based on an existing one, click New on the title bar.
4. In the Workflow Rule Detail page, in the Key Workflow Rule Details section, fill in the scheduled event information.

   The following table describes the fields.

Field	Description
Workflow Name	Enter a unique name, up to 50 characters.
Active	Use the Active check box to activate or deactivate the scheduled event. Up to the time that a scheduled event is made active, the Initiated By field on the scheduled event record shows the name of the user who created the scheduled event. The Initiated By field is shown in the Detail page for the scheduled event after the record is saved. After the Active check box is selected on the scheduled event and the record is saved, the Initiated By field on the record is updated to show the name of the user who selected the Active check box. That user must have access to the list that is selected on the scheduled event at the time that an instance of the event is executed. Otherwise, the instance fails. The Initiated By field in all pending instances and all error instances for the scheduled event also shows the name of the user who selected the Active check box on the scheduled event. For more information about what happens when you activate or deactivate a scheduled event, see About Scheduled Events (on page 1515). **NOTE:** When you make the scheduled event active, an instance is immediately generated for the first scheduled occurrence of the event. As a best practice, set up all of the workflow actions on the scheduled event before you make the event active. Otherwise, if the start time for the scheduled event is near, the first instance might be executed before you have finished setting up the workflow actions.
Description	(Optional) Enter additional information about the scheduled event, such as the purpose of the event.
Record Type	Select the record type for the scheduled event.

Field	Description
	A scheduled event relates to one record type only. After the event is created, you cannot change the record type on the event.
Trigger Event	Select Scheduled Event.
Enable Notification	Select this check box if you want Oracle CRM On Demand to send an email each time an instance of the scheduled event completes successfully, each time an instance of the event fails, and each time a pending instance of the event is deleted. The email is sent to the user who made the scheduled event active.

5 In the Schedule Details section, click the Lookup icon (magnifying glass) and then select the filtered list that returns the records on which you want the workflow actions to act.
6 In the Start Date Time field, select the date and time at which you want the first instance of the scheduled event to be executed.
7 In the Recurring field, select the interval at which you want the scheduled event to repeat, for example, Weekly.
8 In the Every field, set up the interval period for the recurring instances. For example, if you selected Weekly in the Recurring field, and if you want the instances to recur at intervals of two weeks, then enter 2 in the Every field. The minimum value that you can enter is 1.
9 If you selected Monthly in the Recurring field, then you can optionally schedule the scheduled event to execute on the last day of each month in which the event is executed, by selecting the Last day of month check box.

   As an example, if you set up a scheduled event to start on April 23 and to repeat at two-monthly intervals, then the first instance of the event will be executed on April 23. The second instance will be executed on June 23, the third instance will be executed on August 23, and so on. However, if you select the Last day of the month check box, then the first instance of the event will be executed on April 30, the second instance will be executed on June 30, the third instance will be executed on August 31, and so on.
10 Specify the number of times that you want the scheduled event to be executed, or specify the end date and time, by doing one of the following:
   - Select the After option and then specify the number of times that the scheduled event is to be executed. The value you enter must be greater than 0 (zero).
   - Select the By Date Time option, and then select the end date and time for the scheduled event. The end date and time must be later than the start date and time.
11 Save your changes.

About Updating Scheduled Events

After a scheduled event is made active, you cannot change the schedule or select a different list on the scheduled event. However, you can terminate the scheduled event by deactivating it. After you deselect the Active check box on the scheduled event and save the record, you can edit the scheduled event to change the schedule or select a different list. When you make the scheduled event active again, it is treated as a new scheduled event.

CAUTION: When you deactivate a scheduled event, any pending instance of the event is deleted. In addition, if an instance of the scheduled event is currently being executed, then some of the actions might fail for some of the records in the list. For more information about what happens when you deactivate a scheduled event, see About Scheduled Events (on page 1515).

Creating Scheduled Events for Analytics

You can create one or more scheduled events for the Analytics record type and configure one or more Send Email actions on the event to perform the following tasks:

- Execute an Analytics object on behalf of one or more specified users. The Analytics object can be an analysis, a dashboard, or a dashboard page.
- Send the results that are generated for a user to that user as an email attachment.

The specified user's access rights determine the results that are generated for that user.

A scheduled event for the Analytics record type is different from a scheduled event for other record types in the following ways:

- You do not select a list of records for the scheduled event.
- Only the Send Email action is supported.
- On the scheduled event, you add a list of the users on whose behalf the Analytics object is to be executed.
- The Hourly interval type is not available.

A Send Email workflow action for a scheduled event for the Analytics record type is different from a Send Email action for other record types in the following ways:

- You do not specify a recipient for the email that you configure on the action. The emails are sent to the users who are selected on the workflow rule.
- The Send Email action executes an Analytics object, as well as sending the emails with the results to the users.
- You must select the Analytics object that is to be executed, and select the format for the output.

You can create up to a maximum of five Send Email actions on a scheduled event for Analytics. When an instance of the event is executed, all of the actions are performed in sequence for the first user in the list, then all of the actions are performed for the next user, and so on through the list of users.

NOTE: The operations that are performed by workflow actions on scheduled events for the Analytics record type, and the requests and data that are processed by the actions, are counted towards your company's usage against the report services allotments. For information about service allotments, see About Service Allotments (on page 1186). The files that are generated by the workflow actions might also be included in the calculation of the amount of storage used by your company, depending on how long email attachments are retained for your company. The retention period for email attachments is specified in the Email Attachment Expiry (Days) field on the company profile. For more information, see Configuring Company Settings (on page 1124).

Workflow Action Failures

If a workflow action on a scheduled event for the Analytics record type fails for one or more users, then the failure is reported in the Workflow Error Monitor. For more information about what happens when a workflow action on a scheduled event for the Analytics record type fails, see About Workflow Rule and Workflow Action Failures (on page 1504).

Considerations When Scheduling an Event

The following considerations apply when scheduling an event:

- You cannot specify a condition on a scheduled event. The scheduled instances of the event and the workflow actions on the event are always executed unless an error occurs.

  NOTE: After the Scheduled Event trigger event is selected in the Workflow Rule New page, the page refreshes. The Workflow Rule Condition section of the page is removed and the Schedule Details section, where you specify the schedule for the event, becomes available.

- For performance reasons, it is recommended that you avoid configuring multiple scheduled events that are scheduled to execute at the same time.

- You must specify a start date and time for the scheduled event and you must specify either an end date and time, or the number of times the event is to be executed.

  NOTE: Oracle CRM On Demand does not generate any instances for dates and times in the past even if you specify a start date and time that is in the past. For example, if you specify a start date of January 15, 2018 for a scheduled event that is to repeat 10 times at intervals of one month, and if the current date is May 30, 2018, then the first instance of the event is scheduled for June 15, 2018. Only the instances for the five occurrences in the future will be executed.

- If you specify that the scheduled event is to be executed on a certain date in the month, and if that date does not occur in a given month, then the event will not be executed in that month. For example, if you select day 29 in the month, then the event will not be executed in February, unless the year is a leap year.
- You can specify that no email is to be sent to a user if the analysis selected on a Send Email action returns no results for that user. By default, the Send Email if No Results check box is selected on the Send Email action, and the email is sent to all of the users selected on the workflow rule, even if the analysis returns no results for a user. If you deselect the check box, then the email will be sent only to those users for whom the analysis returns results.

  NOTE: The Send Email if No Results check box is available only if an analysis is selected on the Send Email action. It is not available if a dashboard or dashboard page is selected on the Send Email action.

  If no email is sent to a user because the analysis returned no results for that user, then the workflow action is considered to have failed for that user, and the failure is reported in the workflow error monitor.

  TIP: If you want the email to be sent to some users even if the analysis returns no results for those users, but you do not want the email to be sent to other users if the analysis returns no results for them, then you can create two separate scheduled events with Send Email actions to execute the same analysis, but with different sets of users. On the scheduled event with the users to whom you do not want the email to be sent if the analysis returns no results, deselect the Send Email if No Results check box.

The following procedure describes how to create a scheduled event for the Analytics record type.

Before you begin. To perform the following procedure, your user role must have the following privileges:

- Manage Data Rules - Manage Workflow Rules
- Access V3 Analytics

To create a scheduled event for the Analytics record type

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, do one of the following:
   - To create a new scheduled event by copying an existing one, click Copy on the scheduled event that you want to copy.
   - To create a new scheduled event that is not based on an existing one, click New on the title bar.
4. In the Workflow Rule Detail page, in the Key Workflow Rule Details section, fill in the scheduled event information.

   The following table describes the fields.

Field	Description
Workflow Name	Enter a unique name, up to 50 characters.

Field	Description
Active	Use the Active check box to activate or deactivate the scheduled event. Up to the time that a scheduled event is made active, the Initiated By field on the scheduled event record shows the name of the user who created the scheduled event. The Initiated By field is shown in the Detail page for the scheduled event after the record is saved. After the Active check box is selected on the scheduled event and the record is saved, the Initiated By field on the record is updated to show the name of the user who selected the Active check box. The Initiated By field in all pending instances and all error instances for the scheduled event also shows the name of the user who selected the Active check box on the scheduled event. **NOTE:** When you make the scheduled event active, an instance is immediately generated for the first scheduled occurrence of the event. As a best practice, set up all of the workflow actions on the scheduled event before you make the event active. Otherwise, if the start time for the scheduled event is near, the first instance might be executed before you have finished setting up the workflow actions. For more information about what happens when you activate or deactivate a scheduled event, see About Scheduled Events (on page 1515).
Description	(Optional) Enter additional information about the scheduled event, such as the purpose of the event.
Record Type	Select Analytics.
Trigger Event	Only the Scheduled Event trigger event is supported for the Analytics record type.
Enable Notification	Select this check box if you want Oracle CRM On Demand to send email notifications to the user who made the scheduled event active. If this check box is selected, an email is sent each time an instance of the scheduled event completes successfully, each time an instance of the event fails, and each time a pending instance of the event is deleted.

5 In the Start Date Time field, select the date and time at which you want the first instance of the scheduled event to be executed.

6 In the Recurring field, select the interval at which you want the scheduled event to repeat, for example, Weekly.

7 In the Every field, set up the interval period for the recurring instances. For example, if you selected Weekly in the Recurring field, and if you want the instances to recur at intervals of two weeks, then enter 2 in the Every field. The minimum value that you can enter is 1.

8 If you selected Monthly in the Recurring field, then you can optionally schedule the scheduled event to execute on the last day of each month in which the event is executed, by selecting the Last day of month check box.

As an example, if you set up a scheduled event to start on April 23 and to repeat at two-monthly intervals, then the first instance of the event will be executed on April 23. The second instance will be executed on June 23, the third instance will be executed on August 23, and so on. However, if you select the Last day of the month check box, then the first instance of the event will be executed on April 30, the second instance will be executed on June 30, the third instance will be executed on August 31, and so on.

9. Specify the number of times that you want the scheduled event to be executed, or specify the end date and time, by doing one of the following:
   - Select the After option and then specify the number of times that the scheduled event is to be executed. The value you enter must be greater than 0 (zero).
   - Select the By Date Time option, and then select the end date and time for the scheduled event. The end date and time must be later than the start date and time.
10. Save your changes.

Adding Users to Scheduled Events for Analytics

The following procedure describes how to add the list of users on whose behalf the workflow actions on the scheduled event will be executed.

To add a list of users to a scheduled event for Analytics

1. On the Workflow Rule Detail page, in the Execute As related information section, click Add.
2. In the Lookup window, search for the users for whom you want the workflow rule to execute the workflow actions.
3. When you finish selecting users, click OK to close the lookup window.

Creating Send Email Actions for Scheduled Events for Analytics

The following procedure describes how to create a Send Email action for a scheduled event for the Analytics record type.

Before you begin:

- If you want the Send Email action to execute an analysis, then the analysis must be saved in the catalog, in a folder under Shared Folders, and you must have access to the folder. For the action to complete successfully at runtime for a user specified on the scheduled event, that user must also have access to the folder.
- If you want the Send Email action to execute a dashboard or dashboard page:
  - The dashboard or dashboard page must be saved in the system-generated Dashboards subfolder directly under /Shared Folders/Company Wide Shared Folder or in the system-generated Dashboards subfolder directly under /Shared Folders/Migrated Company Wide Shared Folder, and you must have access to the dashboard. If the dashboard or dashboard page is stored in the system-generated Dashboards subfolder directly under /Shared Folders/Migrated Company Wide Shared Folder, then you must have the Access Migrated Company Wide Shared Folder privilege.
  - For the action to complete successfully at runtime for a user specified on the scheduled event, that user must have access to the dashboard or dashboard page. If the dashboard or dashboard page is stored in the system-generated Dashboards subfolder directly under /Shared Folders/Migrated Company Wide Shared Folder, then the user must have the Access Migrated Company Wide Shared Folder privilege.
- If the name of the analysis, dashboard, or dashboard page that you select on the Send Email action contains any of the following special characters, then the character is replaced with an underscore (_) in the name of the file that is sent to the specified user:
  - Asterisk (*)
  - Backslash (\)
  - Colon (:)
  - Comma (,)
  - Double quotation marks (")

- Greater than symbol (>)
- Less than symbol (<)
- Question mark (?)
- Slash (/)
- Vertical bar (|)

To create a Send Email action for a scheduled event for the Analytics record type

1. In the Workflow Rule Detail page, in the Actions related information section, click Menu and select Send Email.
2. In the Workflow Action Edit page, in the Key Action Details section, complete the detail fields for the workflow action.

   For information about the Mark for Translation check box, see Creating Workflow Actions: Send Email (on page 1538).
3. In the Analytics Content Details section, do the following:
   a. In the Content Type field, select the type of Analytics object that you want the action to execute.
   b. In the Content Format field, select the type of output that you want the action to generate.
   c. (Optional) If the selected Analytics object is an analysis, and if you do not want the email to be sent to a user if the analysis returns no results for that user, then deselect the Send Email if No Results check box.
   d. Click the Lookup icon for the Content Name Path field to open a pop-up window that displays the catalog.
   e. Browse to the Analytics object that you want and select it, and then click OK.
   f. (Optional) In the Parameters field, enter the parameters for the Analytics object.

      Specifying the parameters for an Analytics object in a workflow action is similar to specifying the parameters for an analysis or dashboard in a Web applet or Web tab. For more information, see About Specifying Filters for Embedded Reports and Dashboards (on page 1237).
4. In the Email Message section, fill in the From, Reply To, Subject, Email Format, and Message Body fields.

   For information about these fields, see Creating Workflow Actions: Send Email (on page 1538).

   NOTE: If you include fields from the User record type in the email subject or message body, then the fields are populated with the values from the user record of the user on whose behalf the Analytics object is executed.
5. Save the workflow action.

NOTE: If the size of a file that is to be attached to an outbound email is not greater than 2 MB, then Oracle CRM On Demand attaches the file to the email. If the size of the file is greater than 2 MB, then Oracle CRM On Demand zips the file. If the size of the zipped file is not greater than 2 MB, then the zipped file is attached to the email. Otherwise, the file is not attached to the email. The users on whose behalf the scheduled event was executed can access the unzipped files, as well as the emails, through their personal email monitor, regardless of whether or not the files were sent with the emails. For information about accessing the personal email monitor, see Accessing Your Pending and Sent Emails (on page 764). If your user role has the Access Master Audit Trail and Admin Configuration Audit privilege, then you can also access the emails and attachments for all users through the company email monitor. For more information, see Reviewing Your Company's Pending and Sent Emails (on page 1178).

Canceling Workflow Save Operations

In workflow rules that have the Before Modified Record Saved trigger, you can use the Cancel Save functionality to specify that the operation to save the changes that triggered the rule is to be canceled if the condition on the rule is not met. However, changes made by Oracle CRM On Demand are not canceled even if you specify that the save operation is to be canceled.

About Translating Messages for Canceled Workflow Save Operations

When you set up the cancel save functionality on a workflow rule, you can specify a custom message that is returned to the user or Web service if the condition on the rule is not met and the Cancel Save check box is selected for the rule. Your company might want to provide translated versions of the custom message for users who do not use the company default language. The ability to enter translated versions of the custom message is controlled by the Enable Language Translation Support for Workflow Cancel Save Message check box on the company profile. If this check box is deselected on the company profile, then you cannot enter translated messages for the workflow rules.

If the Enable Language Translation Support for Workflow Cancel Save Message check box is selected on the company profile, then the behavior is as follows:

- The Translation Language field is available in the Workflow Rule Detail page and in the Workflow Rule Edit page when you edit an existing workflow rule. After you create a workflow rule in which a custom message is specified, the message appears in blue font and within brackets in every language other than the default language for the company. You can then edit the workflow rules to enter the translated versions of the message.

  NOTE: If you do not specify a custom message, then a default message is returned. You cannot enter translated versions of the default message.

- The Mark for Translation check box is available on the Workflow Rule Edit page and the Workflow Rule Detail page for existing workflow rules. If you change the message in an existing rule in the default language for the company, then you can use the Mark for Translation check box to indicate whether the translated versions of the message are to be replaced by the updated message, or are to remain unchanged. If you select the Mark for Translation check box, then the updated message appears in the default font in the default company language, and appears in blue font and within brackets in every other language until you enter the translated message for the language. If you do not select the Mark for Translation check box when you update the message in the default company language, then the message changes in the default company language, but the translated messages are not changed.

  NOTE: When you create a workflow rule, the Mark for Translation check box is deselected and read-only. The Mark for Translation check box is effective only when you edit an existing workflow rule. In addition, the Mark for Translation check box is read-only if you select any language other than the default language for the company in the Translation Field when you edit the workflow rule.

Before you begin. To perform this procedure, your user role must have the Workflow Cancel Save privilege as well as the Manage Data Rules - Manage Workflow Rules privilege.

NOTE: The Opportunity record type is an exception. You do not need to have the Workflow Cancel Save privilege in your user role to use the Cancel Save functionality in workflow rules for the Opportunity record type. Provided that your user role has the Manage Data Rules - Manage Workflow Rules privilege, you can use the Cancel Save functionality in workflow rules for the Opportunity record type that have the Before Modified Record Saved trigger.

To cancel a workflow save operation if the rule condition is not met

1. In the Workflow Rule Detail page, in the Actions If Condition Is False section of the page, select the Cancel Save check box.
2. (Optional) Specify the error message that is to be displayed when the save operation is canceled because the rule condition is not met.
3. Save your changes.

The following table describes the options in the Actions If Condition Is False section of the Workflow Rule Detail page.

Field	Description
Mark for Translation	This check box is available only if the Enable Language Translation Support for Workflow Cancel Save Message check box is selected on the company profile. If you change the message in a workflow rule in the default language for the company, then use the Mark for Translation check box as follows: - If you want the translated versions of the message to be replaced by the updated message, then select the Mark for Translation check box. - If you want the translated versions of the message to remain unchanged, then do not select the Mark for Translations check box.

Cancel Save	If you select this check box, the following actions are performed if the rule condition is not met:
	- The workflow rule terminates.
	- All subsequent workflow rules based on the same record type that have the Before Modified Record Saved trigger event also terminate.
	- All previous changes to the state of the record, except changes made by Oracle CRM On Demand, are rolled back.
	- The record returns to its original state. However, if Oracle CRM On Demand makes an update to the record, then the change overrides the Cancel Save action. For example, if the primary contact is removed from the related contacts, then Oracle CRM On Demand updates the primary contact information on the parent opportunity record. This update by Oracle CRM On Demand overrides any Cancel Save action on the opportunity record.
	- Any subsequent workflow rules for the same record type that have the When Modified Record Saved trigger event are not triggered.
	- A message is returned as follows:
	    - If the rule is triggered by a user action, then a message is displayed to the user whose action triggered the rule.
	    - If the rule is invoked by a Web service, then a message is returned to the Web service as an error string.
	You can specify the message in the Display Message field.
	
	If this check box is deselected, then the save operation is not affected (and no message is returned) if the condition on the rule is not met.
	
	By default, the Cancel Save check box is deselected.

Field	Description
Display Message	In this field, you can specify the message that is returned to the user or Web service if the condition on the rule is not met, and the Cancel Save check box is selected for the rule. If you do not specify a message in this field, then a default message is returned. The maximum number of characters that the message can contain is 1999.

The following procedure describes how to enter a translated version of a message for a canceled workflow save operation.

To enter a translated version of a message for a workflow

1. In the Workflow Rules List page, click the Edit link for the workflow rule.
2. In the Workflow Rule Edit page, in the Translation Language field, select the language for which you want to enter a translated message.

   NOTE: When you select any language other than the default company language, you cannot create a workflow rule from the Workflow Rule Edit page or the Workflow Rule Detail page. You can create a workflow rule only when the default company language is selected in the Translation Language field.

3. In the Display Message field, enter the translated message.
4. Save your changes.

Repeat this procedure for each language.

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 1491)
- Creating Workflow Rules (on page 1511)

Restricting Workflow Rules to Specific Channels or Roles

When you create a workflow rule with any trigger event other than Scheduled Event, you can restrict the rule to specific channels or roles by adding a condition to the rule.

To prevent a channel from invoking a workflow rule

- Use the ExcludeChannel() function in the condition expression.

  For example, to prevent a large import operation from triggering a workflow rule, use the following condition in the workflow rule:

  ```
  ExcludeChannel ("Import")
  ```

  For more information about the ExcludeChannel() function, see ExcludeChannel (on page 1904).

To restrict a workflow rule to a specific role

- Use the UserValue() function with the <Role> attribute in the condition expression.

For example, to restrict a workflow rule so that it is invoked only when the role of the user whose action triggers the rule is Administrator and the Priority on the record is set to High, use the following condition in the workflow rule:

```
UserValue('<Role>')="Administrator" AND [<Priority>]="High"
```

For more information about the UserValue() function, see UserValue (on page 1932).

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

Creating Workflow Actions: Assign a Book

An Assign a Book action on a workflow rule automatically assigns a book to a record when the conditions on the workflow rule are met. You can select the specific book that is to be assigned to the record, or you can specify an expression that evaluates to the name of the book that is to be assigned to the record.

Specifying an expression that evaluates to a book name allows you to set up an Assign a Book workflow action that can assign a different book to different records, depending on the result of the expression. For example, assume that you have accounts in North America, and you also have accounts based in EMEA. You might want to set up two separate books for the different locations, and assign the appropriate book to an account depending on the location of the account. To set up this configuration, you can create two books, one named North America and the other named EMEA. You can then create a custom picklist field called Sales Location, with the values North America and EMEA, and add the custom field to the page layout for the Account record type for the appropriate roles. Then, you can create an Assign a Book workflow action that does the following when an account record is updated:

- Evaluates an expression to determine the value that is selected in the Sales Location field on the account record.
- Associates the account record with the book whose name matches the value returned by the expression.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create an Assign a Book action.

Before you begin. To perform the following procedure, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 1396).

To create an Assign a Book action

1. Navigate to the rule where you want to create the action:
   a. In the upper-right corner of any page, click the Admin global link.
   b. In the Business Process Management section, click Workflow Configuration.
   c. On the Workflow Rules List page, find the rule where you want to create the action.
      For information about searching for workflow rules in the list page, see Filtering Lists (on page 136).
2. Click the Workflow Name link on the rule.
3. In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Assign a Book.

   NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

4. In the Workflow Action Edit page, enter a name for the action.
5. If you want to enable the action, select the Active check box.
6. To specify the book that is to be assigned to the records, do one of the following:
   - Click the selector button beside the Book Name field, then select the book to which you want to assign the records, and then click OK.
   - Click the *fx* icon to open Expression Builder, then create the expression that evaluates to the name of the book that is to be assigned to the records, and then click Save.

     For example, to support the configuration described earlier in this topic, select the custom Sales Location field from the list. The language-independent name of the field then appears in the expression editor with the appropriate syntax.

     NOTE: If the expression evaluates to a null value or a value that is not a valid book name, then the workflow action fails, and an error is recorded in the Workflow Error Monitor.

     For information about Expression Builder, see Expression Builder (on page 1886).
7. Select the appropriate Assignment Option and Apply To option.

   For a description of the options, see Assigning Records to Books (on page 1454).

   NOTE: If you want the workflow action to reassign the records from one book to a different book, then you can specify the book that is to be replaced in the Replace Book field. You can select the name of the book to be replaced, or you can use Expression Builder to create an expression that evaluates to the name of the book that is to be replaced. If the expression evaluates to a null value or a value that is not a valid book name, then the workflow action fails, and an error is recorded in the Workflow Error Monitor.
8. Save the action.

Record Ownership Modes and Assigning Books

You can configure record types that support custom books in different ownership modes: user mode, mixed mode, or book mode. For more information about records ownership modes, see About Record Ownership Modes (on page 1428). The record ownership mode interacts with workflow rules and actions.

If an Assign a Book workflow action attempts to remove the primary custom book from a record, then the following happens:

- If the record type is configured in book mode, then the workflow action fails.
- If the record type is configured in mixed mode, then Oracle CRM On Demand removes the value in the Book field on the record when the primary custom book is removed from the record.
- If the record type is configured in user mode, then none of the books on the record is a primary custom book, and the record ownership mode does not impact the workflow action.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Create Integration Event (on page 1531)
- Creating Workflow Actions: Create Task (on page 1534)
- Creating Workflow Actions: Send Email (on page 1538)
- Creating Workflow Actions: Update Values (on page 1543)
- Creating Workflow Actions: Wait (on page 1545)

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 1491)
- About Workflow Actions (on page 1500)
- About Time-Based Workflow Rules (on page 1502)

- Creating Workflow Rules (on page 1511)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Deactivating Workflow Rules and Actions (on page 1549)
- Deleting Workflow Rules and Actions (on page 1550)

Creating Workflow Actions: Create Integration Event

A Create Integration Event action on a workflow rule automatically sends an integration event to one or more integration queues when the conditions on the workflow rule are met and a change is detected in at least one of the fields that are tracked by the Create Integration Event action.

About Create Integration Event Actions and Wait Actions

If you want to use a Create Integration Event action to create an integration event that captures the changes made to a record by the event that triggers a workflow rule, then you must place the Create Integration Event action before any Wait action in the sequence of actions on the workflow rule. If a Wait action precedes a Create Integration Event action on a workflow rule, then the Wait action prevents the Create Integration Event action from detecting changes to the record. When the waiting period on the Wait action ends, the record is read again before the remaining actions on the rule are performed, and the values of the fields on the record before the event that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of a field are considered to be the same, and the Create Integration Event action does not create an integration event because it does not detect any change in the tracked fields.

About Picklist Value Formats in Integration Events

Depending on how you set up your integration event queues, the values in picklist fields in the integration events are recorded either in the language of the user whose action causes the integration event to be created, or as language-independent code (LIC) values. For information about specifying the picklist value format for an integration event queue, see Creating Integration Event Queues (on page 1849) and Managing Integration Event Settings (on page 1851).

About the Billing, Shipping, and Primary Flags in Account and Contact Address Records

In integration events for the Account Address record type, you can include the Billing and Shipping flags that indicate whether an address is the designated billing address or shipping address for the account. Similarly, in integration events for the Contact Address record type, you can include the Primary flag that indicates whether an address is the primary address for the contact. However, you cannot track changes to the Billing, Shipping, and Primary flags. This means that changes to these flags cannot be used to trigger the creation of integration events, even if you select the Always Include check box for the flags. If you include one of these flags in an integration event, and if that flag is changed at the same time as a field for which the changes are tracked, then the integration event that is created as a result of the change to the tracked field does not show the new value of the flag. Instead, the integration event shows the value of the flag before the update was made. However, the next time that an integration event is created as a result of a change to a tracked field, the integration event includes the value of the flag field after the previous update was made.

For example, assume that you have two addresses, Address A and Address B, linked to a contact called Jane Smith. Address A is the primary address for Jane Smith. You have a workflow Create Integration Event action for the Contact Address record type that is configured as follows:

- The Track Changes check box is selected for the Address Type field only.
- The Always Include check box is selected for the Primary field.

If a user updates the Address Type field on Address A from the contact address record for Jane Smith and also deselects the Primary check box for Address A, then the integration event that the workflow action creates as a result of the change to the Address Type field shows the new address type, but the value of the Primary flag in the integration event still indicates that the Address A is the primary address for Jane Smith. However, the next time that the Address Type field on Address A from the contact address record is changed and an integration event is created as a result of the change, the Primary flag in the integration event shows that Address A is not the primary address for Jane Smith.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create a Create Integration Event action.

Before you begin. To perform the procedure described here, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 1396).

To create a Create Integration Event action

1 Navigate to the rule where you want to create the action:
   a In the upper-right corner of any page, click the Admin global link.
   b In the Business Process Management section, click Workflow Configuration.
   c On the Workflow Rules List page, find the rule where you want to create the action.
   For information about searching for workflow rules in the list page, see Filtering Lists (on page 136).
2 Click the Workflow Name link on the rule.
3 In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Create Integration Event.

   NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

   TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.

4 In the Workflow Action Edit page, enter a name for the action.
5 If you want to enable the action, select the Active check box.
6 Select the integration queues to which the integration events will be written.
7 In the Schema Version field, if the record type for the workflow rule supports the schema for both Web Services v1.0 and Web Services v2.0, then select the Web service version that is to be used for the integration events.
   If the record type for the workflow rule supports the schema for both Web Services v1.0 and Web Services v2.0, then Web Services v2.0 is selected by default in the Schema Version field, but you can change the selection before you save the workflow action.

   NOTE: After you create and save the workflow action, you cannot change the value in the Schema Version field.

   If the record type for the workflow rule supports only one schema, then that Web service version is selected by default. For more information about the Web services, see Oracle Web Services On Demand Guide.
8 Save the workflow action.
9 From the record-level menu in the list of actions, select Configure for the integration event action that you want to configure.

   NOTE: The Configure option is not available for actions where the trigger event is When Records Are Merged.

10 In the Configure Integration Event Tracking page, select the check boxes for the fields, as needed:
   - Select the Always Include check box if you want the field to be included in the integration event even if the value of the field has not been changed.
   - Select the Track Changes check box if you want an integration event to be generated each time this field is updated.
11 Save your changes.

The following table describes the fields on the Configure Integration Event Tracking page.

Field	Description
Display Name	The name of the field as it is displayed in the user interface.
Integration Tag	The integration tag that is used when the field is included in the integration event. Integration tags are displayed in the Integration Tag Web Services v2.0 column in the *record type* Fields page.
Required	This read-only check box indicates if the field has been set up as a required field.
Always Include	Select this check box if you want the field to be included in the integration event even if the value of the field has not been changed. **NOTE:** The Always Include check box is selected by default and cannot be deselected for certain fields used by Oracle CRM On Demand.
Track Changes	Select this check box if you want an integration event to be generated each time that this field is updated. For more information about the Track Changes check box, see *About the Track Changes Check Box* in this topic.

About the Track Changes Check Box

The Track Changes check box is not available if the trigger event for the workflow rule is Before Record Is Deleted, After Association With Parent, or After Dissociation From Parent. Also, if the trigger event for the workflow rule is After Association With Parent, or After Dissociation From Parent, then the set of fields displayed on the page will be the set of fields at the child record level. You cannot configure the set of fields included in the integration event at the parent record level.

For workflow actions on which the Track Changes check box is available, the workflow action creates an integration event only if the Track Changes check box is selected for at least one field, and if a change is detected in at least one of the fields for which the Track Changes check box is selected. When the integration event is created, all of the fields that have the Always Include check box selected in the workflow action are included in the integration event.

System Field Exceptions

If the trigger event for the workflow rule is anything other than When New Record Saved, then Oracle CRM On Demand does not generate integration events in cases where the Track Changes check box is selected for one or more of the following system fields, and the Track Changes check box is not selected for any other field:

- ModifiedDate
- ModifiedById
- CreatedDate
- CreatedById
- Id

For more information about integration events, see About Integration Events (on page 1848).

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 1529)
- Creating Workflow Actions: Create Task (on page 1534)
- Creating Workflow Actions: Send Email (on page 1538)

Related Topics

See the following topics for related information about workflows:

Creating Workflow Actions: Create Task

A Create Task action on a workflow rule creates a task automatically when the conditions on the workflow rule are met.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

About Configuring Workflow Rules to Create Follow-Up Tasks for Activities

The Create Task action is available for the Activity record type so that you can configure workflow rules to create follow-up tasks when new activity records are saved or existing activity records are updated, deleted, or restored. Follow-up tasks that are created for activity records do not trigger any subsequent workflow rules that are based on the Activity record type. For more information, see Example of Configuring Workflow Rules to Create Follow-Up Tasks for Activities (on page 1537).

Tasks Linked to Parent Records

If a workflow rule is based on a record type that supports child tasks, then when a Create Task action on the rule creates a task, the record that triggered the workflow rule becomes the parent record for the new child task record. In addition, activities created by workflow rule actions are automatically linked to other parent records as follows:

- When a Create Task action creates an activity for an opportunity record, the workflow action automatically links the activity to the parent account for the opportunity as well as to the opportunity record itself.
- When a Create Task action creates an activity for a service request record, the workflow action automatically links the activity to the parent account and the contact for the service request, as well as to the service request record itself.

If a workflow rule is based on a record type that does not support child tasks, then when a Create Task action on the rule creates a task, the task is not linked to any parent record.

The following procedure describes how to create a Create Task action.

NOTE: For a Create Task action to succeed, the user whose actions trigger the workflow rule must have the appropriate access rights to create a task. For information about what happens when a workflow action fails, see About Workflow Rule and Workflow Action Failures (on page 1504).

Before you begin. To perform the following procedure, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 1396).

To create a Create Task action

1. Navigate to the rule where you want to create the action:
   a. In the upper-right corner of any page, click the Admin global link.
   b. In the Business Process Management section, click Workflow Configuration.
   c. On the Workflow Rules List page, find the rule where you want to create the action.

      For information about searching for workflow rules in the list page, see Filtering Lists (on page 136).
2. Click the Workflow Name link on the rule.
3. In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Create Task.

   NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

   TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
4. In the Workflow Action Edit page, enter a name for the action.
5. If you want to enable the action, select the Active check box.
6. Fill in the fields described in the following table, and then save the action.

   NOTE: If you select the Relative User on Record option in the Owner field for the task, and the owner of the record is an inactive user, the task will not be created.

Field	Description
Owner	Select the type of owner for the task (Relative User on Record or Specific User), and then select the owner: ■ If you select Relative User on Record, select the user from the list. If you select a team role as the owner, the workflow rule creates a task for each user who has the assigned team role. **NOTE:** For the Account, Contact, Lead, Opportunity, and Service Request record types, any custom team roles that are added to the record type are available for selection in the list of Relative User on Record owners. For more information on customizing record types, see Record Type Application Customization Page (on page 1199). For information about which users you can select in the Owner field when the workflow action is for the User record type, see Considerations When Creating Workflow Rules for the User Record Type (on page 1510). ■ If you select Specific User, click the Lookup icon, and select the task owner. **NOTE:** For information about how record ownership modes affect the ownership of automatically generated tasks, see Record Ownership Modes and Automatically Generated Tasks (on page 1432).
Type	Select the activity type from the drop-down list.
Activity Subtype	Select the activity subtype from the drop-down list.

Field	Description
Due Date	Enter an expression that evaluates to the due date for the task. You can use Expression Builder to create the expression. Click the *fx* icon beside the field to open the Expression Builder window. The expression can contain a maximum of 1024 characters. **NOTE:** For the workflow action to work correctly, the Due Date field must contain an expression that evaluates to a valid date. Do not enter anything else, such as a date or an integer, in the Due Date field. If the expression that you enter evaluates to a date that is before or the same as the current date, then the due date is the current date by default. There is no limit on how far in the future the calculated date can be set. However, the expression must evaluate to a valid date. If the expression evaluates to an invalid date or to any other data type, such as string, integer, or Boolean, then an error occurs, and the activity is not created. You can use the Check Syntax button in Expression Builder to test the syntax of the expression. However, Expression Builder does not verify that the expression evaluates to a valid date. For information about using Oracle On Demand Expression Builder, see Expression Builder (on page 1886).
Priority	Select the activity priority from the drop-down list.
Status	Select the activity status from the drop-down list.
Task Currency	Select a currency.
Private	Select this check box if you want the task to be visible only to the task owner.
Subject	Enter the subject line for the task. You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a string. For example, the text might include the following: `Call %%%[<ContactLastName>]%%%` If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added. If you use Expression Builder to embed a complex expression, the percent signs might not be added at the appropriate places. In that case, ensure that the percent signs are placed before and after the entire expression so that the expression is evaluated correctly.

Field	Description
	For example, %%%Today() + 30%%% adds 30 days to the current date, but %%%Today() %%%+ 30 concatenates 30 to the string representation of the current date. To use Expression Builder to embed functions and field names in the field, click the *fx* icon beside the field. If you are entering only static text, you do not need to use Expression Builder. This field can contain a maximum of 1024 characters, including the percent signs before and after the expressions.
Description	Enter the description of the task. You can embed functions and field names in the text, as described for the Subject field. This field can contain a maximum of 1024 characters, including the percent signs before and after the expressions.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 1529)
- Creating Workflow Actions: Create Integration Event (on page 1531)
- Creating Workflow Actions: Send Email (on page 1538)
- Creating Workflow Actions: Update Values (on page 1543)
- Creating Workflow Actions: Wait (on page 1545)

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 1491)
- About Workflow Actions (on page 1500)
- About Time-Based Workflow Rules (on page 1502)
- Creating Workflow Rules (on page 1511)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Deactivating Workflow Rules and Actions (on page 1549)
- Deleting Workflow Rules and Actions (on page 1550)

Example of Configuring Workflow Rules to Create Follow-Up Tasks for Activities

This topic provides an example of configuring workflow rules to create follow-up tasks when activity records are created. You might use this functionality differently, depending on your business model.

You want a follow-up task to be created automatically each time a user creates a new activity. The follow-up task is to be set up as follows:

- The task is a call.
- The due date for the follow-up task is two days after the original task is created.
- The priority of the follow-up task is set to 1-High.
- The owner of the follow-up task is the same as the owner of the original activity.

To configure a workflow rule to create a follow-up task for a new activity

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. In the Workflow Rules List page, click New on the title bar.
4. In the Workflow Rule Detail page, in the Key Workflow Rule Details section, fill in the rule information, as follows:
   a. In the Workflow Name field, enter a name for the workflow rule.
   b. Select the Active check box.
   c. In the Record Type field, select Activity.
   d. In the Trigger Event field, select When New Record Saved.
5. Save the workflow rule.
6. In the Workflow Rule Details page, in the Actions title bar, click Menu, and then select Create Task.
7. In the Workflow Action Edit page, fill in the action information, as follows:
   a. In the Action Name field, enter a name for the action.
   b. Select the Active check box.
   c. In the Owner field, select Relative User on Record, then select Activity Owner.
   d. In the Type field, select Call.
   e. In the Due Date field, click the fx icon, enter the following expression in the Expression field in the Expression Builder window, and then save the expression:

      ```
      Today()+2
      ```

   f. In the Priority field, select 1-High.
   g. In the Subject field, enter the subject line for the task, for example, *Follow-Up Call for New Activity*.
8. Save the workflow action.

Creating Workflow Actions: Send Email

A Send Email action on a workflow rule automatically generates email when the conditions on the workflow rule are met. The email is automatically sent out, irrespective of whether the operation that triggered the workflow rule succeeds or fails. Oracle CRM On Demand generates a string for each email so that the email can be tracked in the email delivery system at Oracle. The tracking string is stored in a header that is not visible to the email recipient. Administrators can see a list of the outbound emails that are currently waiting to be sent in the email monitor. For more information about the email monitor, see Reviewing Your Company's Pending and Sent Emails (on page 1178).

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

DKIM Support

Oracle CRM On Demand supports DomainKeys Identified Mail (DKIM) authentication for the emails that are sent by Send Email workflow actions. If your company wants the emails to be authenticated with DKIM, then the domain names that you want to use in the From addresses of the emails must be reserved for you in Oracle CRM

On Demand. You can reserve multiple domain names, but each domain name can be reserved by one company only. If you want the emails to be authenticated with DKIM, then contact Oracle CRM On Demand Customer Care and provide the details of the domain names that you want to reserve.

When a Send Email action for your company is triggered, the domain name in the From address on the workflow email is checked to determine if it is valid for use in the email address, and if the email is to be authenticated with DKIM, as follows:

- If the domain name is reserved for DKIM support in Oracle CRM On Demand by your company, then the domain name is valid and the email is authenticated with DKIM.
- If the domain name is not reserved for DKIM support in Oracle CRM On Demand by any company, including your own company, then the domain name is valid, but the email is not authenticated with DKIM.
- If the domain name is reserved for DKIM support in Oracle CRM On Demand by a company other than your company, then the domain name is invalid, and an error is recorded in the Workflow Error Monitor.
- If the domain name is crmondemand.com, then the domain name is valid and the email is authenticated with DKIM.

About Translating the Subject Line and Message Body Text in Send Email Workflow Actions

After a Send Email action is created, you can optionally edit the action to enter translated versions of the subject line and message body text for the email that is generated by the workflow action. You can enter a translation for each language that is active for your company. If you do not enter a translation of the subject line and message body text for a language, then the version of the text in the default company language is used instead.

When the email action is performed, Oracle CRM On Demand uses the value in the To field of the Send Email action to determine the language for the email, as follows:

- If Specific User or Relative User on Record is selected in the To field, then the language for the email is the user language of the email recipient. If Relative User on Record is selected in the To field, and if the email is being sent to more than one user, then the language for each email is the user language of the recipient of that email.
- If Specific Email Address is selected in the To field, then Oracle CRM On Demand uses the value in the From field of the Send Email action to determine the language for the email, as follows:
  - If Current User is selected in the From field, then the language for the email is the user language of the current user, that is, the signed-in user who triggers the workflow.
  - If Default Email Address or Specific Email Address is selected in the From field, then the language for the email is the default company language.

What Happens If the Send Email Action Is Updated?

When you change the subject line text, or the message body text, or both, in the default company language, you can use the Mark for Translation check box to determine the behavior for the other languages, as follows:

- If you do not select the Mark for Translation check box, then the following happens:
  - For the languages for which a translation was never entered, the subject line and message body text is automatically replaced by the updated text that is specified for the default company language.
  - Any existing translated versions of the subject line and message body text remain unchanged.
- If you select the Mark for Translation check box, then after you save your changes, the subject line and message body text for all of the other languages is overwritten by the subject line and message body text that is specified for the default company language. The text appears in blue font and within brackets for the other languages until you enter the translated version.

  NOTE: If you select the Mark for Translation check box when you update any field on a Send Email action, then when you save your changes, the subject line and message body text for every language is overwritten by the subject line and message body text that is specified for the default company language, even if you did not update the subject line or the message body text in the default company language.

About the Mark for Translation Check Box

The Mark for Translation check box is effective only when you edit an existing Send Email workflow action and the default company language is selected in the Translation Language field. When you create a new workflow Send Email action, the Mark for Translation check box is deselected and read-only. In addition, the Mark for Translation check box is read-only when you select any language other than the default company language in the Translation Language field when you edit the workflow action.

The following procedure describes how to create a Send Email action.

NOTE: The workflow functionality in Oracle CRM On Demand is not intended for use as a tool for mass email sending. If you have a requirement to send a lot of email to your customers, then it is recommended that you use a product such as Oracle CRM On Demand Marketing to fulfill your requirements.

Before you begin. To perform the following procedure, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 1396).

NOTE: The procedure for creating a Send Email action for the Analytics record type is different from the procedure for creating a Send Email action for other record types. For information about creating Send Email actions for the Analytics record type, see Creating Scheduled Events for Analytics (on page 1521).

To create a Send Email action

1. Navigate to the rule where you want to create the action:
   a. In the upper-right corner of any page, click the Admin global link.
   b. In the Business Process Management section, click Workflow Configuration.
   c. On the Workflow Rules List page, find the rule where you want to create the action.

      For information about searching for workflow rules in the list page, see Filtering Lists (on page 136).
2. Click the Workflow Name link on the rule.
3. In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Send Email.

   NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

   TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
4. In the Workflow Action Edit page, enter a name for the action.
5. If you want to enable the action, select the Active check box.
6. In the From field, select or enter the address that you want to appear in the From field of the email that is sent by the workflow action, as follows:
   - Select the Default Email Address option if you want the default address, donotreply@crmondemand.com, to appear in the From field.
   - Select the Current User option if you want the email address of the signed-in user who triggers the workflow to appear in the From field.

     NOTE: When the Send Email action is performed for a scheduled event, the user who made the scheduled event active is considered to be the signed-in user.
   - Select the Specific Email Address option if you want a specific address to appear in the From field, and then specify the address.

     When entering the address, the following restrictions apply:
     - You can enter the email address directly, or click the *fx* icon beside the field, and use Expression Builder to define the email address.
     - Specify only one email address. Multiple addresses are not supported in the From field.
     - If you specify an absolute email address, you must enclose the address in single or double quotation marks.

  - Expression Builder checks only the syntax of the address expressions. It does not check that the address is valid.
  - This field can contain a maximum of 1024 characters.

 NOTE: The Sender header in the email is not populated.

7 (Optional) In the Reply To field, select the option for the address that automatically appears in the To field when the recipient responds to the email that is sent by the Send Email workflow action, as follows:

- Select the Current User option if you want the email address of the signed-in user whose action triggers the workflow rule to appear in the To field in the email response.
- Select the Specific Email Address option if you want to specify the email address or addresses that will appear in the To field in the email response, and then specify the addresses.

  When entering the addresses, the following restrictions apply:

  - You can enter the email addresses directly, or click the fx icon beside the field, and use Expression Builder to define the email addresses.
  - To enter multiple addresses, use a semi-colon (;) delimiter.
  - You must enclose absolute email addresses in single or double quotation marks.
  - Expression Builder checks only the syntax of the address expressions. It does not check that the addresses are valid.
  - This field can contain a maximum of 1024 characters.

  If you leave the Reply To field blank, then no address appears in the To field in the email response.

8 In the To field, select or enter the email address of the email recipient, as follows:

- Select Specific User or Relative User on Record, and then select the recipient, as follows:
  - If you select Specific User, click the Lookup icon, and select the user.
  - If you select Relative User on Record, select the recipient from the list.

  If you select a team role as the recipient, the workflow rule sends the mail to each user who has the assigned team role.

  NOTE: For the Account, Contact, Lead, Opportunity, and Service Request record types, any custom roles that are added to the record type are available in the list of Relative User on Record recipients. For more information on customizing record types, see Record Type Application Customization Page (on page 1199). For information about the recipients to whom you can send email when the workflow action is for the User record type, see Considerations When Creating Workflow Rules for the User Record Type (on page 1510).

- Select the Specific Email Address option, and then specify the addresses.

  When entering the addresses, the following considerations apply:

  - You can enter email addresses directly, or click the *fx* icon beside the field, and use Expression Builder to define email addresses.
  - To enter multiple addresses, use a semi-colon (;) delimiter.
  - You must enclose absolute email addresses in single or double quotation marks.
  - Expression Builder checks only the syntax of the address expressions. It does not check that the addresses are valid.
  - This field can contain a maximum of 1024 characters.
  - If an expression that you enter here returns an email address that contains any character that is not supported for use in email addresses in the standard application, then Oracle CRM On Demand

cannot send email to that address, even if the Allow Unicode Characters in Email Fields check box is selected on the company profile. For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses (on page 61).

The following example shows an entry with multiple addresses:

```
PRE('<EmailField1>') + ";" + [<EmailField1>] + ";" + "john.doe@company.com"
```

NOTE: When you create a Send Email workflow action for the User record type, the Specific Email Address option is not available in the To field. Only the Specific User and Relative User on Record options are available.

9 Enter the subject line for the email.

You can embed functions and field names in the text. Three percent signs (%%%) before and after an embedded function or field name indicate that it is to be converted to a text value.

For example, the text might include the following:

```
A new %%%[<AccountType>]%%% account has been created
```

If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added. If you use Expression Builder to embed a complex expression, the percent signs might not be added at the appropriate places. In that case, ensure that the percent signs are placed before and after the entire expression so that the expression is evaluated correctly.

For example, `%%%Today() + 30%%%` adds 30 days to the current date, but `%%%Today() %%%+ 30` concatenates 30 to the string representation of the current date.

To use Expression Builder to embed functions and field names in the field, click the *fx* icon beside the field. If you are entering only static text, you do not need to use Expression Builder.

This field can contain a maximum of 1024 characters, including the percent signs before and after the functions and field names.

10 In the Email Format field, select the format that you want to use for the email message.

You can select Plain Text or HTML for the message format.

11 Enter the message for the email.

You can embed functions and field names in the text, as described in Step 8.

For example, the text might include the following:

```
Hello Mr %%%[<ContactLastName>]%%%,
```

This field can contain a maximum of 16,350 characters, including the percent signs before and after the expressions.

For information about considerations when using HTML code in the message, and a list of the elements and attributes that are supported, see HTML Code for Note Fields and Workflow Email Messages (on page 63).

12 Save the action.

The following procedure describes how to enter a translated version of the subject line and message body text in the email.

NOTE: If you do not enter a translation of the subject line and message body text for a language, then the version of the text in the default company language is used instead. If you later change the subject line text, or the message body text, or both, in the default company language in an existing Send Email action, and if you do not select the Mark for Translation check box, then the updates are also applied to the subject line and message body text for any language for which a translation has never been entered.

To enter a translated version of the subject line and message body text for the email

1. In the Workflow Rule Detail page, click the Edit link for the Send Email workflow action for which you want to enter the translation.
2. In the Workflow Action Edit page, in the Translation Language field, select the language for which you want to enter the translation.
3. In the Subject field, enter the translated version of the subject line of the email.

   You can embed functions and field names in the text.
4. In the Message Body field, enter the translated version of the message text.

   You can embed functions and field names in the text.
5. Save your changes.
6. Repeat this procedure for each language for which you want to enter a translation.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 1529)
- Creating Workflow Actions: Create Integration Event (on page 1531)
- Creating Workflow Actions: Create Task (on page 1534)
- Creating Workflow Actions: Update Values (on page 1543)
- Creating Workflow Actions: Wait (on page 1545)

Related Topics

See the following topics for related information about workflows:

- About Workflow Rules (on page 1491)
- About Workflow Actions (on page 1500)
- About Time-Based Workflow Rules (on page 1502)
- Creating Workflow Rules (on page 1511)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Deactivating Workflow Rules and Actions (on page 1549)
- Deleting Workflow Rules and Actions (on page 1550)

Creating Workflow Actions: Update Values

An Update Values action on a workflow rule automatically updates fields when a record is changed, without losing the information about the original change (that is, information about when the record was changed, by whom, and what data was changed). The action is performed after the end of the wait period defined in one or more Wait actions, if any, that precede the Update Values action on the workflow rule.

Unless the trigger event for the workflow rule is Before Modified Record Saved, there must be at least one active Wait action that precedes the Update Values action on the workflow rule. Except on workflow rules where the trigger event is Before Modified Record Saved, Oracle CRM On Demand allows you to activate an Update Values action only if the action is preceded by at least one active Wait action on the workflow rule. Where a workflow rule has a number of Update Values actions, you do not need to have a Wait action for each Update Values action. It is sufficient to have one Wait action that precedes all of the Update Values actions on the rule.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create an Update Values action.

Before you begin. To perform the following procedure, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 1396).

To create an Update Values action

1. Navigate to the rule where you want to create the action:
   a. In the upper-right corner of any page, click the Admin global link.
   b. In the Business Process Management section, click Workflow Configuration.
   c. On the Workflow Rules List page, find the rule where you want to create the action.

      For information about searching for workflow rules in the list page, see Filtering Lists (on page 136).
2. Click the Workflow Name link on the rule.
3. In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Update Values.

   NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

   TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
4. In the Workflow Action Edit page, enter a name for the action.
5. If you want to enable the action, select the Active check box.
6. Fill in the fields described in the following table, and then save the action.

Field	Description
Field Name	Select the name of the field that is to be updated from the drop-down list. **NOTE:** The set of fields that can be updated is determined by the record type for the workflow rule. Also, if a field is specified as read only at the field setup level, then that field cannot be updated through the Update Values action. For some record types, the set of fields that can be updated includes some Custom Object fields. The Custom Object 1, Custom Object 02, and Custom Object 03 fields, and the corresponding ID fields can be updated for a number of record types. For the Opportunity record type, the Custom Object 05 and Custom Object 06 fields, and the corresponding ID fields can also be updated.
Value	Click the *fx* icon beside the field, and define the expression that calculates the new value for the field. You can use the Check Syntax button in Expression Builder to test the syntax. This field can contain a maximum of 1024 characters. If you define an expression to calculate a field, such as a custom Margin field, where Margin equals Revenue minus Cost, then the field value is calculated each time the workflow rule is triggered, even if the Revenue or the Cost has not changed. For better performance, you can define an additional condition on the workflow rule, such as: `FieldValue('<Revenue>') <> PRE('<Revenue>') OR FieldValue('<Cost>') <> PRE('<Cost>')`

Field	Description
	The PRE function returns the value that was in the field before the field was updated.
Overwrite Existing Values	Select this check box if the existing value in the field is to be overwritten with the new value. If the field already contains a value, the value is not updated unless this check box is selected. If the field is empty, the field is updated with the new value, even if this check box is deselected.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 1529)
- Creating Workflow Actions: Create Integration Event (on page 1531)
- Creating Workflow Actions: Create Task (on page 1534)
- Creating Workflow Actions: Send Email (on page 1538)
- Creating Workflow Actions: Wait (on page 1545)

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 1491)
- About Workflow Actions (on page 1500)
- About Time-Based Workflow Rules (on page 1502)
- Creating Workflow Rules (on page 1511)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Deactivating Workflow Rules and Actions (on page 1549)
- Deleting Workflow Rules and Actions (on page 1550)

Creating Workflow Actions: Wait

A Wait action causes Oracle CRM On Demand to delay the execution of other (following) actions on a workflow rule until after a wait period has passed. You can specify the wait period as a period of time, or you can specify an end date and time for the wait period. Also, you can specify the wait period directly or create an expression to calculate it.

NOTE: The wait period specifies the minimum amount of time that must pass before Oracle CRM On Demand starts to execute the other actions on the workflow rule. The actual amount of time that passes before the other actions are executed might be longer, depending on the load on the Oracle CRM On Demand database and the Oracle CRM On Demand server, and also on the number of Wait actions that are pending when the wait period ends.

About Wait Actions and Create Integration Event Actions

If you want to use a Create Integration Event action to create an integration event that captures the changes made to a record by the event that triggers a workflow rule, then you must place the Create Integration Event action before any Wait action in the sequence of actions on the workflow rule. If a Wait action precedes a Create Integration Event action on a workflow rule, then the Wait action prevents the Create Integration Event action from detecting changes to the record. When the waiting period on the Wait action ends, the record is read again before the remaining actions on the rule are performed, and the values of the fields on the record before the event that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of a field are considered to be the same, and the Create Integration Event action does not create an integration event because it does not detect any change in the tracked fields.

NOTE: You can create multiple actions for a workflow rule, up to a maximum of 25 actions for each rule.

The following procedure describes how to create a Wait action.

Before you begin. To perform the following procedure, you must have the Manage Data Rules - Manage Workflow Rules privilege in your user role. For information on adding privileges to roles, see Adding Roles (on page 1396).

To create a Wait action

1. Navigate to the rule where you want to create the action:
   a. In the upper-right corner of any page, click the Admin global link.
   b. In the Business Process Management section, click Workflow Configuration.
   c. On the Workflow Rules List page, find the rule where you want to create the action.

   For information about searching for workflow rules in the list page, see Filtering Lists (on page 136).
2. Click the Workflow Name link on the rule.
3. In the Actions title bar on the Workflow Rule Detail page, click Menu, and select Wait.

   NOTE: The trigger event on the workflow rule determines what types of actions can be created on the rule.

   TIP: You can create a copy of an existing workflow rule action by clicking the Copy link for the action.
4. In the Workflow Action Edit page, enter a name for the action.
5. If you want to enable the action, select the Active check box.
6. If you do not want Oracle CRM On Demand to reevaluate the rule conditions after the wait period ends, deselect the Reevaluate Rule Conditions After Wait check box.

   NOTE: For more information about the Reevaluate Rule Conditions After Wait check box, see About Time-Based Workflow Rules (on page 1502).
7. Specify the duration of the wait, using one of the following options:
   - Select the Period option, and then enter the period for the delay in years, months, days, hours, and minutes, as follows:
     - In the Years field, enter a positive integer value between 0 (zero) and 5.
     - In the Months field, enter a positive integer value between 0 (zero) and 12.
     - In the Days field, enter a positive integer value between 0 (zero) and 200.
     - In the Hours field, enter a positive integer value between 0 (zero) and 200.
     - In the Minutes field, enter a positive integer value between 0 (zero) and 59.

     You cannot specify a negative value or a noninteger value such as 1.5.

     NOTE: The maximum period that you can specify using the Period option is 5 years, 12 months, 200 days, 200 hours, and 59 minutes. If you want to specify a longer period, then use the Period Expression option instead of the Period option.
   - Select the Period Expression option, then click the *fx* icon beside the field, and use Expression Builder to create an expression to calculate the period for the delay.

     You can use the Duration function in Expression Builder to calculate a period in days or fractions of days. For more information, see Duration (on page 1902).

     The expression must evaluate to a number. The following are examples of valid expressions to calculate the period for a delay:

```
Duration('P0YT1H') + Duration('P0YT1M') + Duration('P1Y')
Duration('P0YT1H') + 1
Duration('P1YT1H') - 1
```

There is no limit on the length of the period that can be returned by the expression.

NOTE: If the calculated wait period is negative, the wait period is set to zero, and the Wait action completes immediately. Any remaining actions on the workflow rule are executed without delay.

- Select the Time option, click the calendar icon, and select the end date and time for the delay.

  Select the time according to the time zone specified in your personal settings.
- Select the Time Expression option, then click the *fx* icon beside the field, and use Expression Builder to create an expression to calculate the end date and time for the delay.

  You can use the Duration function in Expression Builder to calculate a period in days or fractions of days. For more information, see Duration (on page 1902).

  The expression must evaluate to a date and time. The following are examples of valid expressions to calculate the end date and time for a delay:

```
Timestamp() + Duration('P0YT5M')
Today() + Duration('P0YT1H5M')
```

NOTE: If the calculated end date and time has already passed, the wait period on the action is set to 0 (zero) and the Wait action completes immediately. Any remaining actions on the workflow rule are executed without delay.

If the expression does not evaluate to a valid date and time, the Wait action completes immediately, and any remaining actions on the workflow rule are executed without delay.

There is no limit on how far in the future the calculated date can be set.

8 Save the action.

For step-by-step procedures for creating other types of workflow actions, see the following topics:

- Creating Workflow Actions: Assign a Book (on page 1529)
- Creating Workflow Actions: Create Integration Event (on page 1531)
- Creating Workflow Actions: Create Task (on page 1534)
- Creating Workflow Actions: Send Email (on page 1538)
- Creating Workflow Actions: Update Values (on page 1543)

Related Topics

See the following topics for related information about workflows:

- About Workflow Rules (on page 1491)
- About Workflow Actions (on page 1500)
- About Time-Based Workflow Rules (on page 1502)
- Creating Workflow Rules (on page 1511)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Deactivating Workflow Rules and Actions (on page 1549)
- Deleting Workflow Rules and Actions (on page 1550)

Changing the Order of Workflow Rule Actions

If there is more than one action on a workflow rule, the actions are performed in the order specified on the workflow rule, starting with the action numbered 1. Each action is completed before the next action starts. You can change the order of the actions on a rule.

To change the order of the actions on a workflow rule

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule where you want to change the order of the actions.

   For information about searching for workflow rules in the list page, see Filtering Lists (on page 136).
4. Click the Workflow Name link on the rule.
5. In the Actions title bar on the Workflow Rule Detail page, click the Edit Order button.
6. On the Edit Action Order page, click the arrow icons to do the following:
   - Move an action up or down within the list.
   - Move an action to the top or bottom of the list of actions.

   NOTE: If there is an Update Values action on the rule, then it must be preceded by at least one active Wait action on the rule unless the trigger event for the workflow rule is Before Modified Record Saved.
7. Click Save to save your changes.

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 1491)
- About Workflow Actions (on page 1500)
- About Time-Based Workflow Rules (on page 1502)
- Creating Workflow Rules (on page 1511)
- Creating Workflow Actions: Assign a Book (on page 1529)
- Creating Workflow Actions: Create Integration Event (on page 1531)
- Creating Workflow Actions: Create Task (on page 1534)
- Creating Workflow Actions: Send Email (on page 1538)
- Creating Workflow Actions: Update Values (on page 1543)
- Creating Workflow Actions: Wait (on page 1545)

Changing the Order of Workflow Rules

When you create a workflow rule, Oracle CRM On Demand automatically assigns the rule to the next unused order number for the rules that are based on the same record type and the same trigger event. If the trigger event for the workflow rule is After Association With Parent or After Dissociation From Parent, then Oracle CRM On Demand automatically assigns the rule to the next unused order number for rules that are based on the same record type, the same trigger event, and the same parent record type. For workflow rules that have a trigger event other than Scheduled Event, the order number determines the order in which Oracle CRM On Demand invokes a sequence of workflow rules that are based on the same record type and the same trigger event, and if applicable, on the same parent record type. You can change the order of your rules.

NOTE: Workflow rules that have the Scheduled Event trigger event are also assigned an order number but they are not performed in sequence. The order number is read-only for scheduled events.

For example, if you create a workflow rule based on the Account record type, with the trigger event, Before Record Is Deleted, and two workflow rules already have the same record type and trigger event, then your new rule is assigned order number 3. You can later change the order number, so that your new rule is the first rule invoked for the specified record type and trigger event.

The following procedure describes how to change the order of a workflow rule.

To change the order of workflow rules

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule whose order you want to change, and click the name link on the rule.

   For information about searching for workflow rules in the list page, see Filtering Lists (on page 136).
4. On the Workflow Rule Detail page, click Edit Order.
5. In the Edit Workflow Order page, click the arrow icons to do the following:
   - Move a workflow rule up or down within the list.
   - Move a workflow rule to the top or bottom of the list of rules.
6. Click Save to save your changes.

NOTE: If you delete a workflow rule, the other rules based on the same record type and the same trigger event are automatically reordered. However, if you make a workflow rule inactive, its order within the list of rules based on the same record type and the same trigger event does not change (but the rule is not invoked).

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 1491)
- About Workflow Actions (on page 1500)
- About Time-Based Workflow Rules (on page 1502)
- Creating Workflow Rules (on page 1511)
- Changing the Order of Workflow Rule Actions (on page 1548)

Deactivating Workflow Rules and Actions

If you deactivate a workflow rule while an instance of a Wait action on the rule is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

If you deactivate a Wait action on a workflow rule while an instance of the Wait action is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

NOTE: For information about what happens when you deactivate a scheduled event (that is, a workflow rule with the Scheduled Event trigger event), see About Scheduled Events (on page 1515).

The following procedure describes how to deactivate a workflow rule.

To deactivate a workflow rule

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule that you want to deactivate.

   For information about searching for workflow rules in the List page, see Filtering Lists (on page 136).
4. In the record-level menu for the rule, select Edit.

5. In the Workflow Rule Detail page, deselect the Active check box.
6. Save your changes.

The following procedure describes how to deactivate a workflow rule action.

To deactivate a workflow rule action

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule from which you want to delete the action.

   For information about searching for workflow rules in the List page, see Filtering Lists (on page 136).
4. Click the Workflow Name link for the rule.
5. In the Workflow Rule Detail page, in the Actions section, find the action that you want to delete.
6. In the record-level menu for the action, select Edit.
7. In the Workflow Action Edit page, deselect the Active check box.

   NOTE: If there is an Update Values action on the rule, then the action must be preceded by at least one active Wait action on the rule, unless the trigger event for the workflow rule is Before Modified Record Saved. If you attempt to deactivate a Wait action, and if no other Wait action precedes the Update Values action, then Oracle CRM On Demand does not allow you to deactivate the Wait action.
8. Save your changes.

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 1491)
- About Workflow Actions (on page 1500)
- About Time-Based Workflow Rules (on page 1502)
- Creating Workflow Rules (on page 1511)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Changing the Order of Workflow Rules (on page 1548)
- Deleting Workflow Rules and Actions (on page 1550)

Deleting Workflow Rules and Actions

When you delete a workflow rule, all actions on the rule are also deleted. Also, the order numbers on the remaining rules for the relevant record type are automatically updated as necessary to ensure that there is no gap in the sequence of the numbers.

If you delete a workflow rule while one or more instances of a Wait action on the rule are in the pending state, then those pending instances are deleted from the Workflow Wait Monitor. None of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

When you delete an action from a workflow rule, the order numbers on the remaining actions on the rule are automatically updated as necessary to ensure that there is no gap in the sequence of the numbers.

If you delete a Wait action from a workflow rule while an instance of the Wait action is in the pending state, then when the waiting period ends on the instance of the action, none of the remaining actions on the workflow rule are performed, and none of the subsequent workflow rules in the sequence of rules for the record type are triggered.

NOTE: For information about what happens when you delete a scheduled event (that is, a workflow rule with the Scheduled Event trigger event), see About Scheduled Events (on page 1515).

The following procedure describes how to delete a workflow rule.

To delete a workflow rule

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule that you want to delete.
   For information about searching for workflow rules in the List page, see Filtering Lists (on page 136).
4. In the record-level menu for the rule, select Delete.
5. Confirm that you want to delete the rule.

The following procedure describes how to delete a workflow rule action.

To delete a workflow rule action

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Configuration.
3. On the Workflow Rules List page, find the rule from which you want to delete the action.
   For information about searching for workflow rules in the List page, see Filtering Lists (on page 136).
4. Click the Workflow Name link for the rule.
5. In the Workflow Rule Details page, in the Actions section, find the action that you want to delete.
6. In the record-level menu for the action, select Delete.

   NOTE: If the rule has an Update Values action, then the action must be preceded by at least one active Wait action for the rule unless the trigger event for the workflow rule is Before Modified Record Saved. If you attempt to delete a Wait action, and if there is no other Wait action preceding the Update Values action, then Oracle CRM On Demand does not allow you to delete the Wait action.

7. Confirm that you want to delete the action.

Related Topics

See the following topics for related workflow information:

- About Workflow Rules (on page 1491)
- About Workflow Actions (on page 1500)
- About Time-Based Workflow Rules (on page 1502)
- Creating Workflow Rules (on page 1511)
- Changing the Order of Workflow Rule Actions (on page 1548)
- Changing the Order of Workflow Rules (on page 1548)
- Deactivating Workflow Rules and Actions (on page 1549)

Workflow Monitors

From the workflow monitors, you can view information about the following:

- Failed instances of workflow rules and workflow actions. For more information, see Workflow Error Monitor (on page 1552).
- Pending instances of Wait actions. For more information, see Workflow Wait Monitor (on page 1556).

Workflow Error Monitor

You can use the information provided in the Workflow Error Monitor to help you to understand why certain instances of a workflow rule or workflow action failed. If necessary, you can access the details of a workflow rule from the Workflow Error Monitor, so that you can correct any errors in the configuration of the workflow action. Details of the error instances are retained in the Workflow Error Monitor for 30 days or until you delete them, whichever comes first.

For information about the types of failures that are reported in the Workflow Error Monitor, see About Workflow Rule and Workflow Action Failures (on page 1504).

For information about using the Workflow Error Monitor, see the following topics:

- Viewing Error Instances in the Workflow Error Monitor (on page 1552)
- Deleting Error Instances from the Workflow Error Monitor (on page 1553)
- Workflow Error Instance Fields (on page 1553)

Viewing Error Instances in the Workflow Error Monitor

The following procedure describes how to view error instances in the Workflow Error Monitor. For information about the types of failures that are reported in the Workflow Error Monitor, see About Workflow Rule and Workflow Action Failures (on page 1504).

Before you begin: To use the workflow monitors, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

To view an error instance in the Workflow Error Monitor

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Monitor.
3. On the Workflow Monitor page, click Workflow Error Monitor.
4. On the Error Instances List page, find the instance that you want.

   TIP: For information about filtering lists, see Filtering Lists (on page 136).
5. To view details of an instance, click the Instance ID link.
6. To view details of the workflow rule of which a record is an instance, click the Workflow Name link for that record.

The following procedure describes how to create a filtered list of error instances.

To create a filtered list of error instances

- On the Error Instances List page, click Menu in the title bar, and select Create New List.

  For more information about creating and refining lists, see Creating and Refining Lists (on page 130).

The following procedure describes how to manage filtered lists of error instances.

To manage filtered lists of error instances

- On the Error Instances List page, click Menu in the title bar, and select Manage Lists Page.

  For more information about managing lists, see Manage Lists Page (on page 140).

The following procedure describes how to view the filter for a list of error instances.

To view the filter for a list of error instances

- On the Error Instances List page, click Menu in the title bar, and select Show List Filter.

  For more information about list filters, see View List Page (on page 141).

For more information about using the Workflow Error Monitor, see the following topics:

- Workflow Error Monitor (on page 1552)
- Deleting Error Instances from the Workflow Error Monitor (on page 1553)
- Workflow Error Instance Fields (on page 1553)

Related Topics

See the following topic for related information about workflow rules:

- Workflow Configuration (on page 1490)

Deleting Error Instances from the Workflow Error Monitor

You can delete error instances from the Workflow Error Monitor one at a time. Details of the error instances are retained in the Workflow Error Monitor for 30 days or until you delete them, whichever comes first.

NOTE: The batch delete facility is not available in the Error Instances List page.

Before you begin: To use the workflow monitors, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

The following procedure describes how to delete an error instance from the Workflow Error Monitor.

To delete an error instance from the Workflow Error Monitor

1. On the Error Instances List page, find the instance that you want to delete.

   TIP: For information about filtering lists, see Filtering Lists (on page 136).

2. Click the Delete link for the instance.

For more information about using the Workflow Error Monitor, see the following topics:

- About Workflow Rule and Workflow Action Failures (on page 1504)
- Workflow Error Monitor (on page 1552)
- Viewing Error Instances in the Workflow Error Monitor (on page 1552)
- Workflow Error Instance Fields (on page 1553)

Related Topics

See the following topic for related information about workflow rules:

- Workflow Configuration (on page 1490)

Workflow Error Instance Fields

This topic provides information about the fields that you can view for failed instances of workflow rules, scheduled events, and workflow actions in the Workflow Error Monitor.

The following table describes the fields that you can view for failed instances of workflow rules and failed instances of the workflow actions on the workflow rules.

Field	Description
Instance ID	The ID that Oracle CRM On Demand generates for this workflow instance.

Field	Description
Workflow Name	For an instance of a failed workflow rule, the name of the rule. For an instance of a failed workflow action, the name of the workflow rule on which the action is configured. Clicking the name of the workflow rule opens the Workflow Rule Detail page, where you can view details of the rule configuration.
Workflow Action	The name of the workflow action. The record is an instance of this workflow action. If the record is an instance of a failed workflow rule, then this field is blank.
Trigger Event	The event that triggers the workflow rule.
Record Type	The record type of the record on which the instance of the workflow rule was triggered.
Record Row Id	The row ID of the record on which the instance of the workflow rule was triggered. If the workflow rule or workflow action instance failed because of a syntax error, then this field is blank.
Parent Record Type	If the record that triggered the instance of the workflow rule is the child of a parent record in the context of the action that triggered the workflow rule, then this field shows the record type of the parent record.
Parent Record Row Id	If the record that triggered the instance of the workflow rule is the child of a parent record in the context of the action that triggered the workflow rule, then this field shows the row ID of the parent record.
Error Message	The reason why this instance of the workflow rule or workflow action ended.
Initiated By	The name of the user whose action triggered the instance of the workflow rule.
Initiated On	The date and time when the instance of the workflow rule was triggered.
Terminated On	The date and time that this instance of the workflow rule or workflow action ended.

Field	Description
Channel Name	The name of the channel through which the instance of the workflow rule was triggered, such as Web Services, Online, Import, and so on.

The following table describes the fields that you can view for failed instances of scheduled events and failed instances of the workflow actions on the scheduled events.

Field	Description
Instance ID	The ID that Oracle CRM On Demand generates for this scheduled event or workflow action instance.
Workflow Name	For an instance of a failed scheduled event, the name of the scheduled event. For an instance of a failed workflow action, the name of the scheduled event on which the action is configured. Clicking the name of the scheduled event opens the Workflow Rule Detail page, where you can view details of the configuration of the scheduled event.
Workflow Action	The name of the workflow action. The record is an instance of this workflow action. If the record is an instance of a failed scheduled event, then this field is blank.
Trigger Event	This field always shows Scheduled Event.
Record Type	The name of the record type for which the scheduled event is configured.
Record Row Id	For an instance of a failed workflow action, the ID of the record for which the action failed. For an instance of a failed scheduled event, this field is blank.
Parent Record Type	Not applicable
Parent Record Row Id	Not applicable
Error Message	The reason why this instance of the scheduled event or workflow action failed.
Initiated By	The name of the user who made the scheduled event active.
Initiated On	The date and time when the instance of the scheduled event or workflow action was generated.

Field	Description
Terminated On	The date and time when the instance of the scheduled event or workflow action terminated.
Occurrence #	The number that was assigned to this instance of the scheduled event within the set of occurrences for the event.
Channel Name	Not applicable

For more information about using the Workflow Error Monitor, see the following topics:

- About Workflow Rule and Workflow Action Failures (on page 1504)
- Workflow Error Monitor (on page 1552)
- Viewing Error Instances in the Workflow Error Monitor (on page 1552)
- Deleting Error Instances from the Workflow Error Monitor (on page 1553)

Related Topics

See the following topic for related information about workflow rules:

- Workflow Configuration (on page 1490)

Workflow Wait Monitor

From the Workflow Wait Monitor, you can view the details of the following:

- Pending instances of Wait actions and details of those workflow actions.
- Instances of scheduled events (that is, workflow rules with the Scheduled Event trigger event) that are pending or are currently executing.

For example, if an instance of a workflow Wait action or an instance of a scheduled event is pending for longer than you expect, then you can use the Workflow Wait Monitor to investigate the instance and look at the configuration of the workflow rule, scheduled event, or workflow action. If necessary, you can delete the instance.

NOTE: When you delete a pending instance of a Wait action, none of the remaining actions on the workflow rule are performed. When you delete a pending instance of a scheduled event, the instance of the event is canceled, the status of the scheduled event is set to Terminated, and the scheduled event is deactivated. No further instances are generated for the remaining occurrences of the scheduled event.

Pending Instances of Wait Actions

To understand how pending instances of Wait actions are processed on a workflow rule, consider the following example. You might configure a workflow rule with the following intended sequence of actions:

1. A Wait action with a duration of 24 hours
2. A Send Email action
3. A Wait action with a duration of 48 hours
4. A Send Email action
5. A Create Task action

If the actions are correctly configured, then the first Wait action in the sequence, action 1, remains in the Pending state for at least 24 hours. After the wait period ends, the Send Email action (action 2) is performed. The second Wait action (action 3 on the workflow rule) is next in the sequence. It remains in the Pending state for at least 48 hours. After the wait period ends, the Send Email action (action 4) and the Create Task action (action 5) are performed.

NOTE: The wait period specifies the minimum amount of time that must pass before Oracle CRM On Demand starts to execute the other actions on the workflow rule. The actual amount of time that passes before the other actions are executed might be longer, depending on the load on the Oracle CRM On Demand database and the Oracle CRM On Demand server, and also on the number of Wait actions that are pending when the wait period ends.

However, if the wait period on action 3 was incorrectly specified as 48 days rather than 48 hours, then the action remains in the Pending state until 48 days have passed. You can see the action in the Workflow Wait Monitor, and you can view the action details to see whether the wait period is incorrectly specified. You can then delete the Wait action instance.

When you delete the Wait action instance, the workflow rule instance is terminated, and the remaining actions on the rule instance are not performed. In the previous example, the following occurs:

- If you delete action 1 while it is pending, then actions 2, 3, 4, and 5 are not performed.
- If you delete action 3 while it is pending, then actions 4 and 5 are not performed.

NOTE: Wait actions are the only type of workflow actions that are held in the Pending state.

Pending Instances of Scheduled Events

A pending instance of a scheduled event remains in the Queued state until the date and time when the instance is scheduled to be executed (the resume date). The resume date is the earliest possible time that the instance will be executed. Depending on the load on the Oracle CRM On Demand database and on the Oracle CRM On Demand server at that time, and on the number of Wait action instances and scheduled event instances that are pending, the instance might not be executed immediately. After the instance starts to execute, the status of the instance changes to Running and the Actual Start Date field is populated. You might need to refresh your browser page to see the updated fields. The instance continues to appear in the Workflow Wait Monitor while it is executing.

If necessary, you can delete an instance of a scheduled event while it is executing. If you do so, then the instance is removed from the Workflow Wait Monitor. In addition, the status of the scheduled event is set to Terminated, the scheduled event is deactivated, and no further instances are generated for the remaining occurrences of the scheduled event. The instance continues to execute until the next time that Oracle CRM On Demand checks to determine if the scheduled event is still active. This check is performed at five-minute intervals during the time that an instance is executing. When Oracle CRM On Demand determines that the scheduled event has been deactivated, the instance that was executing terminates, and any workflow action that has not already been performed for the instance is not performed.

You can also delete an instance of a scheduled event while it is pending (that is, while the status is set to Queued), as described in Deleting Pending Instances from the Workflow Wait Monitor (on page 1559).

Related Topics

For information about scheduled events, see the following topics:

- About Scheduled Events (on page 1515)
- Creating Scheduled Events (on page 1517)

For information about using the Workflow Wait Monitor, see the following topics:

- Viewing Pending Instances in the Workflow Wait Monitor (on page 1558)
- Deleting Pending Instances from the Workflow Wait Monitor (on page 1559)
- Workflow Pending Instance Fields (on page 1560)

Viewing Pending Instances in the Workflow Wait Monitor

The following procedure describes how to view pending instances in the Workflow Wait Monitor. For information about what is recorded and displayed in the Workflow Wait Monitor, see Workflow Wait Monitor (on page 1556) and Workflow Pending Instance Fields (on page 1560).

Before you begin: To use the workflow monitors, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

To view a pending instance in the Workflow Wait Monitor

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Workflow Monitor.
3. On the Workflow Monitor page, click Workflow Wait Monitor.
4. On the Pending Instances List page, find the instance that you want.

   TIP: For information about filtering lists, see Filtering Lists (on page 136).

5. To view details of an instance, click the Instance ID link.
6. To view details of the workflow action or scheduled event of which the record is an instance, click the Workflow Name link.

The following procedure describes how to create a filtered list of pending instances.

To create a filtered list of pending instances

- On the Pending Instances List page, click Menu in the title bar, and select Create New List.

  For more information about creating and refining lists, see Creating and Refining Lists (on page 130).

The following procedure describes how to manage filtered lists of pending instances.

To manage lists of pending instances

- On the Pending Instances List page, click Menu in the title bar, and select Manage Lists Page.

  For more information about managing lists, see Manage Lists Page (on page 140).

The following procedure describes how to view the filter for a list of pending instances.

To view the filter for a list of pending instances

- On the Pending Instances List page, click Menu in the title bar, and select Show List Filter.

  For more information about list filters, see View List Page (on page 141).

For more information about using the Workflow Wait Monitor, see the following topics:

- Workflow Wait Monitor (on page 1556)
- Deleting Pending Instances from the Workflow Wait Monitor (on page 1559)
- Workflow Pending Instance Fields (on page 1560)

Related Topics

See the following topic for related information about workflow rules and scheduled events:

- Workflow Configuration (on page 1490)

Deleting Pending Instances from the Workflow Wait Monitor

You can delete pending instances from the Workflow Wait Monitor one at a time. You can also delete multiple pending instances at the same time, by creating a filtered list of the instances and using the batch delete facility. For information about what is recorded and displayed on the Workflow Wait Monitor, see Workflow Wait Monitor (on page 1556) and Workflow Pending Instance Fields (on page 1560).

The following considerations apply to deleting pending instances:

- When you delete a pending instance of a Wait action from the Workflow Wait Monitor, the workflow rule instance is ended, and none of the remaining actions on the workflow rule are performed.
- When you delete a pending instance of a scheduled event, the instance of the event is canceled, the status of the scheduled event is set to Terminated, and the scheduled event is deactivated. No further instances are generated for the remaining occurrences of the scheduled event.

  If you want further instances of the scheduled event to be generated, then you must make the scheduled event active again. For information about updating scheduled events, see Creating Scheduled Events (on page 1517).
- After you delete a pending instance of a Wait action or a pending instance of a scheduled event, you cannot restore it.

Before you begin: To use the workflow monitors, your user role must have the Manage Data Rules - Manage Workflow Rules privilege.

The following procedure describes how to delete a pending instance from the Workflow Wait Monitor.

To delete a pending instance from the Workflow Wait Monitor

1. On the Pending Instances List page, find the instance that you want to delete.

   TIP: For information about filtering lists, see Filtering Lists (on page 136).
2. Click the Delete link for the instance.

The following procedure describes how to delete a list of pending instances from the Workflow Wait Monitor.

To delete a list of pending instances from the Workflow Wait Monitor

1. If you have not already done so, create the list of instances that you want to delete.

   For more information about creating and refining lists, see Creating and Refining Lists (on page 130).
2. On the Pending Instances List page, click Menu, and select Batch Delete.
3. Click OK to confirm that you want to proceed.
4. On the Batch Delete and Restore Queue page, in the Active Requests section, click Proceed.

   NOTE: If you do not click Proceed, then the records are not deleted.

   TIP: You can return to the Batch Delete and Restore Queue page at any time by clicking the Admin global link, and then clicking Batch Delete and Restore Queue on the Admin Homepage.
5. To review the log file for the delete operation, on the Batch Delete and Restore Queue page, in the Processed Requests section, click View Delete Log.

For more information about using the Workflow Wait Monitor, see the following topics:

- Workflow Wait Monitor (on page 1556)
- Viewing Pending Instances in the Workflow Wait Monitor (on page 1558)
- Workflow Pending Instance Fields (on page 1560)

Related Topics

See the following topic for related information about workflow rules:

- Workflow Configuration (on page 1490)

Workflow Pending Instance Fields

The following table describes the fields that you can view for pending instances of Wait actions and scheduled events.

Field	Description for Instances of Workflow Wait Actions	Description for Instances of Scheduled Events
Instance ID	The ID that Oracle CRM On Demand generates for this workflow instance.	The ID that Oracle CRM On Demand generates for this scheduled event instance.
Workflow Name	The name of the workflow rule on which the workflow action is configured. Clicking the name of the workflow rule opens the Workflow Rule Detail page, where you can view details of the workflow rule configuration.	The name of the scheduled event of which this is an instance.
Workflow Action	The name of the workflow action. The instance is an instance of this workflow action.	Not applicable
Trigger Event	The event that triggers the workflow rule.	This field always shows Scheduled Event.
Initiated By	The name of the user whose action triggered the instance of the workflow rule.	The name of the user who made the scheduled event active.
Initiated On	The date and time when the instance of the workflow rule was triggered.	The date and time when the pending instance was generated.
Resumes On	The date and time when the wait period for this instance of the workflow action will end.	The date and time after which the pending instance will be executed.
Actual Start Date	Not applicable.	If the instance has not yet started to execute, then this field is blank. If the instance is currently executing, then this field shows the date and time when the instance started executing.

Field	Description for Instances of Workflow Wait Actions	Description for Instances of Scheduled Events
Status	The value in this field is always set to Queued. **NOTE:** After an instance of a Wait workflow action starts to execute, the instance is removed from the Workflow Wait Monitor.	If the instance has not yet started to execute, then this field is set to Queued. If the instance is currently executing, then this field is set to Running. **NOTE:** After an instance of a scheduled event completes, the instance is removed from the Workflow Wait Monitor.
Occurrence #	Not applicable	The number of instances of the scheduled event that have been triggered. The count includes the current pending instance. **NOTE:** If a scheduled event is deactivated and later made active again, then the number of occurrences is reset to 1 on the first instance that is generated after the rule is made active.
Record Type	The record type of the record on which the instance of the workflow rule was triggered.	The record type for which the scheduled event is configured.
Record Row Id	The row ID of the record on which the instance of the workflow rule was triggered.	Not applicable
Parent Record Type	If the record that triggered the instance of the workflow rule is the child of a parent record in the context of the action that triggered the workflow rule, then this field shows the record type of the parent record.	Not applicable
Parent Record Row Id	If the record that triggered the instance of the workflow rule is the child of a parent record in the context of the action that triggered the workflow rule, then this field shows the row ID of the parent record.	Not applicable

For more information about using the Workflow Wait Monitor, see the following topics:

- Workflow Wait Monitor (on page 1556)

Related Topics

See the following topic for related information about workflow rules:

- Workflow Configuration (on page 1490)

Data Rules and Assignment

Click a topic to see step-by-step instructions for procedures for setting up assignment rules (to assign records automatically), forecast definitions, lead conversion layouts and mappings, sales methodologies, and industries:

Related Topics

See the following topics for related information:

- About Assignment Rules (on page 1562)
- Lead Conversion Administration (on page 1570)

About Assignment Rules

Before you begin. To set up the assignment rules, your role must include the Data Rules and Assignment privilege.

Assignment rules allow you to automatically assign a lead, an opportunity, a service request, or an account to the appropriate person, team, and territory, based on the rules (called rule groups) that you set up.

If your company has selected the group assignment option, all group members share the records you assign to a member of that group. For more information, see Group Management (on page 1458).

Depending on your company's structure and business processes, assignment rules can be simple. For example:

- Sales leads for each geographic region are assigned to the regional sales manager.
- New service requests are assigned to the technical service manager.

Or, the rules can be more complex. For example:

- Most leads are assigned by product expertise and geographic location, but some are assigned to a telemarketing manager.
- Most service requests are assigned by problem area, but all requests involving a particular product are routed to one person.

The following table describes how you can assign record types:

This record type	Has these assignment options
Accounts	You can assign the records to an employee or territory. Additionally, you can specify teams that share ownership of the newly assigned accounts.

This record type	Has these assignment options
Leads	You can assign the records to an employee.
Opportunities	You can assign the records to an employee or a territory. Additionally, you can specify teams that share ownership of the newly assigned opportunities.
Service Requests	You can assign the records to an employee.

The assignment rules in the active rule group are evaluated when the following occurs in relation to a record type:

- For leads: The Reassign Owner check box is selected and the change is saved.
- For service requests:
  - The service request is created without an owner or the owner is deleted from the record (that is, the Owner field is blank).
  - The Reassign Owner check box is selected and the change is saved.
- For accounts: The Reassign Owner check box is selected and the change is saved.
- For opportunities: The Reassign Owner check box is selected and the change is saved.

NOTE: The assignment manager attempts to reassign a record immediately after the Reassign Owner check box is selected on the record and the record is saved. However, when a lead record is being converted to an account or opportunity, any attempt to reassign the account or opportunity fails because the assignment manager cannot reassign the record until the lead is fully converted. For example, using a workflow rule to select the Reassign Owner check box, or setting a default value on the account or opportunity when the lead is being converted, does not result in the record being reassigned. You must instead reassign the record manually by selecting the Reassign Owner check box on the converted record after the record is fully converted.

Email Notifications

When a lead or service request is assigned an owner, an email is sent to the new owner. The template that is used for the email is determined by the language that is selected in the Personal Detail page of the new owner. For example, if the user wants to receive the notification emails in Spanish, then Spanish must be selected in the Language field on the user's Personal Detail page. You can turn off email notification for service requests on a rule basis by deselecting the Send Email Notification check box (flag) on the Service Request Assignment Rule Edit page. For information about updating assignment rules, see Setting Up Assignment Rules (on page 1566).

In the email notifications, the From address is always donotreply@crmondemand.com and the Sender field is set to the address that you specify in the Return E-mail field on the assignment rule group. Oracle CRM On Demand appends a string to each email so that the email can be tracked in the email delivery system at Oracle. If an email recipient responds to an email notification, then the To field in the reply is set to the address that you specify in the Return E-mail field on the assignment rule group.

Tracking the Reassignment Process

You can use three fields to help you to track the owner reassignment process, or to run analyses to determine how long the reassignment process takes. You can add these fields to Account, Opportunity, Lead, and Service Request page layouts. The fields are:

- Assignment Status

  The status can be Queued (the record is in the queue to be processed by assignment manager), or Processing (the record is currently being processed by assignment manager), or blank (the record is neither in the queue or being processed).
- Last Assignment Submission Date

If the record is queued for processing or is currently being processed by assignment manager, this field shows the date and time the record was saved with the Reassign Owner check box selected. However, in the case of a service request record, this field shows the date and time the record was saved with the Owner field blank.

- Last Assignment Completion Date

  If a record has never been reassigned, this field is blank; otherwise, the field shows the date and time the record was last reassigned.

For more information on adding fields to page layouts, see Customizing Static Page Layouts (on page 1267).

Making Rule Groups Active

You can create multiple assignment rule groups, but only one rule group can be active at a time for each record type.

CAUTION: The rule group that was marked *active* the last time that the rules were released continues to be active until the rules are released again. When the rules are next released, the rule group that was most recently marked *active* becomes active. When you create a new rule group, and mark it active, do not delete the previously active rule group until after the rules have been released.

TIP: Rule groups can serve as historical reference for the leads. Instead of deleting rule groups, you can mark them as inactive.

About Group Assignment

If your company assigns records to entire groups instead of one employee, your company administrator must:

1. Select the Default Group Assignment field in the Company Profile page (see Setting Up Your Company Profile and Global Defaults (on page 1123)).
2. Set up the groups before activating the assignment rules (see Setting Up Groups (on page 1461)).
3. Select one member in the group to be the owner for accounts or opportunities during the assignment procedure.

   NOTE: The group functionality is not supported for lead or service request records.

When the record is assigned to an owner in the group:

- The Owner field shows the owner's information.
- The Primary Group field shows the group name that the owner belongs to on the record Edit and Detail pages, if the company administrator added the field to the layout.
- The record appears in the areas of the applications that normally display that employee's records, such as Homepages and record lists.

Generally, all members in the group have full access to the record, although access levels can be adjusted to restrict a user's access.

About Assignment Manager and Record Ownership Modes

The assignment manager can reassign records only to users. It can reassign records only if the record type is configured in the user mode or mixed mode of record ownership. If there is a primary custom book assigned to the record before the assignment manager reassigns the record to an owner, then the assignment manager removes the primary book from the record. The assignment manager cannot reassign records if the record type is configured in book mode. If you configure a record type in book mode, then it is strongly recommended that you make all rule groups for that record type inactive. For more information about record ownership modes, see About Record Ownership Modes (on page 1428).

Scenario for Assigning Leads

The following is an example of a typical company's business rules for assigning leads. To set up the rules that automatically assign this company's leads, the administrator does the following:

1. States the company's business rules for assigning leads to people.

For example, for accounts in the U.S., many sales territories are assigned by state, but in certain states, the product expertise determines the territory assignments. In addition, Corporation XYZ account is always assigned to one particular sales manager regardless of the lead's state or product interest.

2 Lists all of the assignment scenarios that are necessary to cover the business rules:
   - **Account (company) is Corporation XYZ.** Assign to Sales Manager A.
   - **Primary Address - State is CA, NV, OR, WA.** Assign to Sales Manager B.
   - **Primary Address - State is OH, IN, MI, NY, KY.** Assign to Sales Manager C.
   - **Lead is interested in the ABC Product (in all states except those listed already, and not for Corporation XYZ).** Assign to Sales Manager D.
   - **Primary Address - State is not listed.** Assign to Sales Manager E.

3 Puts the scenarios in the order in which they are to be considered.

   First, examine the Account field. If the value is Corporation XYZ, assign the lead to Sales Manager A, regardless of any other conditions. If this criterion is not matched, examine the Primary Address State field. If the value is CA, NV, OR, or WA, assign the lead to Sales Manager B, and so on.

As a best practice, use the Record Assignment Template to help you plan your company's assignment scenarios, and to set up rules that give you the results you want.

Criteria Conditions in Assignment Rules

You can use the following conditions in the criteria on assignment rules:

- **Between.** Matches the rule to records where the value in the criterion field is between two values defined on the rule criterion. (The results do not include records where the value in the criterion field is equal to one of the values on the rule.) Use a comma to separate the values. Do not use a dash (-) to specify a value range or to separate values.

  Use the Between condition for date fields only. Use the MM/DD/YYYY date format.
- **Contains all values.** Matches the rule to records where the value in the criterion field matches the exact values. The application does not retrieve substrings of the values, or the same value with different capitalization. You can enter a single value or multiple values separated by commas.
- **Contains exact field value.** Matches the rule to records where the criterion field contains all of the string in the criterion field value, and no additional characters. For example, if you enter *Closed* as the criterion value, the rule is matched to records where the criterion field value is Closed, but not records where the criterion value is Closed/won.

  You cannot use the Contains exact field value condition for date fields or number fields.
- **Contains none of the values.** Matches the rule to records where the criterion field contains any values that are not equal to the rule criterion value.

  You cannot use the Contains none of the values condition for date fields or number fields.
- **Less than or equal to.** Matches the rule to records where the value in the criterion field is less than or equal to the rule criterion value.

  You can use the Less than or equal to condition for number fields and currency fields only.
- **Greater than or equal to.** Matches the rule to records where the value in the criterion field is greater than or equal to the rule criterion value.

  You can use the Greater than or equal to condition for number fields and currency fields only.

Note the following points regarding rule criteria:

- A rule without criteria always succeeds.
- Rules are evaluated in sequential order, and evaluation stops when the criteria on a rule are met.

For example, if ten rules are being evaluated and the criteria on rule 6 are met, then rules 7, 8, 9, and 10 are ignored (that is, they are not evaluated). Similarly, if there are no criteria on rule 6, rule 6 succeeds, and rules 7, 8, 9, and 10 are ignored.

For step-by-step instructions on how to set up assignment rules, see Setting Up Assignment Rules (on page 1566).

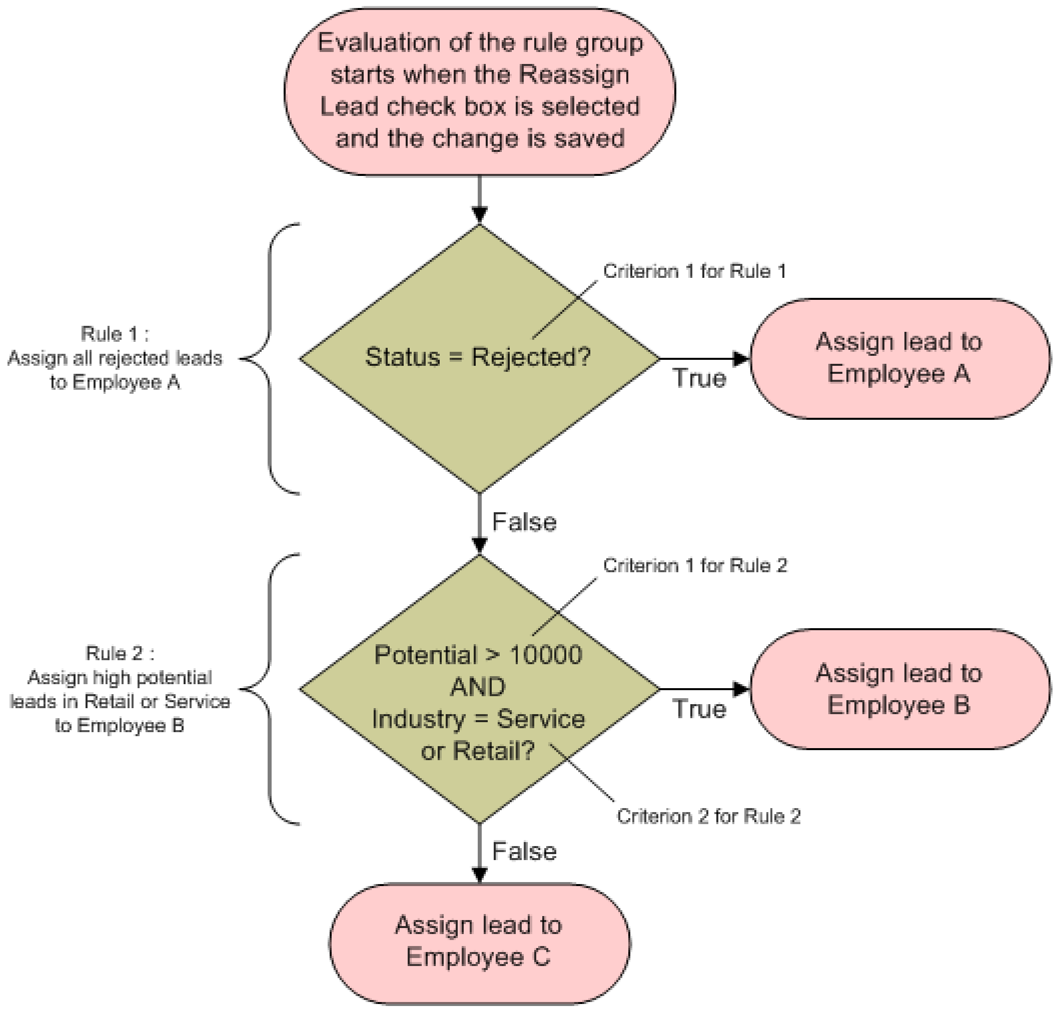
Setting Up Assignment Rules

Before you begin:

- To set up the assignment rules, your role must include the Data Rules and Assignment privilege.
- For information about designing your assignment rules, see About Assignment Rules (on page 1562).

Assignment Rule Group Example

Rule groups are made up of rules, which, in turn, are made up of criteria. The following figure shows the components of a rule group.



How a Lead Assignment Rule Group Is Evaluated

NOTE: For correct behavior of the Reject button on the Lead Detail page, the first rule in the rule group must assign rejected leads.

To set up assignment rules

1 In the upper right corner of any page, click the Admin global link.
2 In the Business Process Management section, click the Data Rules & Assignment link.
3 In the Assignment Rules section, click the link for the appropriate record type.
  A list of all of the rule groups that have been defined for your company to date appears.
4 Create a new rule group:
  a Click the New Rule Group button.
  b On the New/Edit page, fill in the fields.

Field	Description
Rule Group Name	A unique name, up to 30 characters.
Active Rule Group	Only one rule group can be active at a time. If you specify a new rule group as active, the previously-activated rule group becomes inactive.
Unassigned Owner	An employee who inherits the records that are not assigned by one of the rules. **Example:** Employee C in Figure 1.
Return E-mail	This field appears for lead and service request rule groups only. The email address that you specify in the Return E-mail field on the assignment rule group appears in the Sender field in the email notifications that are sent to the owners of leads and service requests. Also, if an email recipient responds to an email notification, then the To field in the reply is set to the address that you specify in the Return E-mail field. **NOTE:** No email notifications are sent for account and opportunity records.
Unassigned Account Territory	A territory that inherits the records that are not assigned by one of the rules. This field appears for account rule groups only.
Unassigned Opportunity Territory	A territory that inherits the records that are not assigned by one of the rules. This field appears for opportunity rule groups only.

  c Save the record.
  This saves the name of the new rule group in preparation for adding rules to the rule group.
5 Add a rule to the rule group:
  a In the Rules title bar on the Rule Group Detail page, click New.
  b On the New/Edit page, fill in the fields.
  The Example column in this table shows how to fill in the fields for Rule 2 in Figure 1.

Field	Description	Example
Rule Name	A unique name.	Assign high potential leads in Retail or Service
Order	The order in which the rules are evaluated. When the criteria on one rule are met, the record is assigned and subsequent rules are ignored.	1
Assign To Owner	If the rule criteria are met, the record is assigned to this user. For group assignment of accounts and opportunities, the user must be a member of the group sharing the records.	Employee B
Assign To Territory	If the rule criteria are met, the record is assigned to this territory. This field appears for account and opportunity rules only.	North Eastern Region
Include Related Contacts	If the rule criteria are met, the contacts linked to the account are assigned to the specified account owner and territory. This field appears for account rules only.	Not applicable
Include Related Opportunities	If the rule criteria are met, the opportunities linked to the account are assigned to the specified account owner and territory. This field appears for account rules only.	Not applicable
Include Team Assignment	If the rule criteria are met, the team members are assigned to the account. This field appears for account and opportunity rules only.	Not applicable

c Save the record.

This saves the rule so you are now ready to add criteria to the rule.

6 (Optional) For accounts and opportunities, update the access for linked records and users:

a On the Rule Group Detail page, click the Name link of the rule where you want to update the access for linked records and users.

b On the Rule Detail page, click Add Users or Edit Users in the Team Assignment title bar.

c Click the Lookup icon and select the users.

 d. Assign the access level for accounts, contacts, and opportunities.
 e. Save your changes.

7. Add a rule criterion to the rule:
 a. In the Rule Criteria title bar on the Rule Detail page, click New.
 b. On the New/Edit page, fill in the fields.

 The Example column in this table shows how to fill in the fields for Rule 2 in Figure 1.

Field	Description	Example
Field	Name of the field to be evaluated. **NOTE:** If a field has been relabeled, the new field name appears.	Potential Revenue
Condition	The following conditions cannot be used for date fields or number fields: Contains all values, Contains exact field value, and Contains none of the values. The following conditions can be used for number fields and currency fields only: Greater than or equal to, Less than or equal to. The Between operator can be used for date fields only.	Greater than or equal to
Value(s)	Use commas to separate values. If the value you want to match includes a comma, such as an address, enclose the value in quotation marks. If the condition is Between, enter the minimum and maximum values separated by commas.	10000

 c. Do one of the following:
 - If you want to add more criteria to the rule, click Save and New Rule Criteria and go back to Step b. If you have multiple criteria defined for a rule, the record must match *all of the criteria* in order for the rule to be matched.
 - If you have entered all criteria for the rule, click Save.

8. In the Rule title bar on the Rule Detail page, click Back to Rule Group Detail.
9. On the Rule Group Detail page, do one of the following:
 - If you want to add more rules to the rule group, go back to Step 5.
 - If you have entered all the rules for the rule group, click Back to Rule Group List to finish.

 TIP: Rules are executed in the order they appear in the Rule Group, so make sure they appear in the correct sequence. After one rule is met, subsequent rules are ignored.

To edit, activate, or inactivate a rule group

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules & Assignment link.
3. In the Assignment Rules section, click the link for the type of assignment rules that you want to edit.

 A list of all the rule groups of that type that have been defined for your company to date appears.
4. Click the Rule Group link that you want to update.
5. On the Rule Group Detail page, click Edit.

6 Update the fields, and save the record.

The changes that you make take effect at midnight Oracle Server time (default), or whenever your assignment rule groups have been set to update.

CAUTION: When you mark a rule group *active,* the rule group that was marked *active* the last time that the rules were released continues to be active until the rules are released again. When the rules are next released, the rule group that was most recently marked *active* becomes active. When you mark a rule group *active,* do not delete the previously active rule group until after the rules have been released.

To edit assignment rules

1 On the Rule Group Detail page, click the Edit link of the rule that you want to change.
2 Update the fields.

NOTE: You can change the order in which rules are evaluated by editing the Order field. On the rule that you want to change, enter an order number that is higher than the order number of the rule that is to precede the rule you are changing, and lower than the order number of the rule that is to follow it.

For example, if there are three rules, ordered 1 through 3, and you want to change the order so that the rule that is currently number 1 is evaluated after the rule that is currently number 2, change the order of rule number 1 to a value, such as 2.1 (or any value greater than 2 and less than 3).

3 Save the record.

Lead Conversion Administration

Users at your company can convert lead records to account, contact, and opportunity records. If your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition, users can also convert lead records to deal registration records.

When users convert a lead record, they can do one of the following:

- Create new account, contact, opportunity, or deal registration records, which are linked automatically to the lead record.
- Link the lead record to existing account and contact records. Users select the records that they want to link to the lead when they convert the lead.

If you make the necessary options available in the lead conversion layouts, then users can also do the following:

- Copy the members of the lead team to the team on the account, contact, and opportunity that are created or linked to the lead during the conversion process.
- Link the lead's associated custom object records to the account, contact, and opportunity that are created or linked to the lead during the conversion process.

You can determine which options are available to users on the Convert Lead page by creating lead conversion layouts for the page, and assigning these layouts to user roles.

In the standard application, some information from the lead record is carried over to the relevant fields in the account, contact, opportunity, and deal registration records that are created or linked to the lead during the conversion process. You can determine what information is carried over by configuring the following:

- The mappings between the fields on the Lead record type and the Account, Contact, Deal Registration, and Opportunity record types. For more information, see Mapping Additional Fields During Lead Conversion (on page 1571).
- The fields from the lead record that appear in the Opportunity and Deal Registration sections of the Convert Lead page. Users can edit the values of these fields on the Convert Lead page. These values are then carried over to the new opportunity or deal registration. For information about configuring which fields appear on the Convert Lead page, see Creating Lead Conversion Layouts (on page 1572).

NOTE: Only the fields that are mapped to fields in the relevant record type are available to be added to the Convert Lead page layout. If a field that you want to add to the Convert Lead page is not already mapped to fields on the relevant record type, then you must map it before you can add it to the layout of the Convert Leads page. In addition, concatenated fields and fields of the Web Link field type are not available to be added to a lead conversion layout, even if such fields are mapped to fields on the relevant record type. The Associated Opportunity field and the Next Step field always appear in the Opportunity section of the Convert Lead page, and the Deal Registration Name field and the Principal Partner Account field always appear in the Deal Registration section. You cannot remove these fields from the page layout.

To convert leads, users must have the appropriate access to record types and the appropriate privileges in their role. For more information, see Access Profile and Role Settings for Converting Leads (on page 255).

When users reject a lead, they must select a rejection code in the Reject Code field in the Reject a Lead page. A number of values are provided by default for the Reject Code field, but you can change these values or add more values to the list. For more information about the Reject Code picklist, see Reject Code for Leads (on page 1575).

Related Topics

For more information about lead conversion administration, see the following topics:

- Process of Setting Up Lead Conversion (on page 1571)
- Mapping Additional Fields During Lead Conversion (on page 1571)
- Creating Lead Conversion Layouts (on page 1572)

Process of Setting Up Lead Conversion

To set up lead conversion and rejection settings for your users and record types, perform the following tasks:

1. If you want to map additional fields during lead conversion, set up the new mappings.

   For more information on mapping fields, see Mapping Additional Fields During Lead Conversion (on page 1571).
2. If you want to customize the layout of the Convert Lead page:
   a. Create the new layouts.

      For more information on creating layouts, see Creating Lead Conversion Layouts (on page 1572).
   b. Add the new layouts to the appropriate roles.

      For more information on adding roles, see Adding Roles (on page 1396).
3. Make sure that the users have the appropriate access to record types and the appropriate privileges in their role.

   For more information about the settings that are required for converting leads, see Access Profile and Role Settings for Converting Leads (on page 255).
4. If you want to edit the values in the Reject Code picklist, edit the field values.

   For more information on editing field values, see Creating and Editing Fields (on page 1219). For more information about the Reject Code picklist, see Reject Code for Leads (on page 1575).

Mapping Additional Fields During Lead Conversion

Users at your company can convert lead records to account, contact, and opportunity records. If your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition, users can also convert lead records to deal registration records.

When users convert leads to account, contact, opportunity, or deal registration records, some values are carried over to the new records by default. However, you can extend the amount of information that is carried over by mapping additional fields, including custom fields. For an example of how lead fields can be mapped, see Leads (on page 242).

When users convert a lead record, the values in the mapped fields are carried over as follows:

- When users create new account, contact, opportunity, or deal registration records, the values from the mapped fields on the lead record are carried over to the specified fields in the new record.
- When users link the lead record to existing account, contact, opportunity, or deal registration records that they select when converting the lead, the fields in the existing records that already have values remain unchanged. Fields that are empty are updated with the value from the mapped lead field.

NOTE: A partner user cannot approve a deal registration or assign an approver to a deal registration. Therefore, when a partner user tries to convert a lead to a deal registration, the conversion fails if the conversion process tries to update the Current Approver field or the Final Approver field on the deal registration record. If your company allows partner users to convert leads to deal registrations, then do not map any field on the Lead record type to the Current Approver field or the Final Approver field in the Deal Registration record type.

About Web Link Fields

Do not map Web link fields for lead conversion. Web link fields do not contain data, instead, they contain scripts for links that users can click to perform actions. The contents of Web link fields cannot be carried over to the new records when a lead is converted.

About Concatenated Fields

Do not map concatenated fields for lead conversion. A *concatenated field* is a field that can display the values from multiple fields and can also display text. The contents of a concatenated field cannot be carried over to the new records when a lead is converted. If you want to carry over the values from the fields that appear within a concatenated field to the new records when a lead is converted, then map the individual fields for lead conversion.

About Customized Picklist Fields and Values

You can map picklist fields from the lead record to text fields (long or short) on account, contact, opportunity, and deal registration records, or to a picklist field with identical values.

Before you begin. To perform the following procedure your role must include the Data Rules and Assignment privilege.

To map additional fields when converting a lead record

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Data Rules & Assignment.
3. In the Lead Conversion Administration section, click Lead Conversion Mapping.
4. On the Lead Conversion Mapping page, select the fields to map.
5. To revert the mapping back to the default settings, click the Default button in the title bar.
6. Click Save.

Creating Lead Conversion Layouts

You can specify what options are available to users when they convert leads, by creating customized layouts for the Convert Lead page, and then assigning the layouts to user roles.

NOTE: To convert leads to accounts, contacts, opportunities, or deal registrations, users must also have the appropriate settings in their access profiles and role. For more information about the settings that are required for converting leads, see Access Profile and Role Settings for Converting Leads (on page 255).

The following table shows the options that you can make available on the Convert Lead page.

Record Type	Options
Account	Do Not Convert to Account Use Existing Account Auto-create New Account Copy Lead Team to Account Associate Custom Object *n*, where *n* is a number between 01 and 40
Contact	Use Existing Contact Auto-create New Contact Copy Lead Team to Contact Associate Custom Object *n*, where *n* is a number between 01 and 40
Opportunity	Do Not Convert to Opportunity Auto-Create New Opportunity Copy Lead Team to Opportunity Associate Custom Object *n*, where *n* is a number between 01 and 40
Deal Registration	Do Not Create Deal Registration Auto-Create Deal Registration **NOTE:** The Deal Registration options are applicable only if your company is set up to use Oracle CRM On Demand Partner Relationship Management Edition.

A standard layout is provided. The standard layout includes some of the options for accounts, contacts and opportunities, but it does not include any of the options for deal registrations. You can copy the standard layout and then edit the copy, but you cannot edit or delete the standard layout.

Depending on the options you make available for a record type, the record type sections on the Convert Lead page are affected as follows:

- If you do not make any of the options available for a record type, the Convert Lead page does not include a section for that record type.
- If you make only the Do Not Convert to Account option available for the Account record type, the Accounts section does not appear on the page.
- If you make only the Do Not Convert to Opportunity option available for the Opportunity record type, the Opportunity section does not appear on the page.
- (Applicable in Oracle CRM On Demand Partner Relationship Management Edition only) If you make only the Do Not Create Deal Registration option available for the Deal Registration record type, the Deal Registration section does not appear on the page.

Before you begin. To perform the procedure described in this section, your role must include the Data Rules and Assignment privilege.

To create a lead conversion layout

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Data Rules & Assignment.
3. In the Lead Conversion Administration section, click Lead Conversion Layout.
4. In the Lead Conversion Layout List page, click New Layout.
5. In Step 1, Layout Name:
   a. Enter the name for the layout.
   b. (Optional) Enter a description for the layout.
   c. If you want this layout to be the default for all users, select the Default Lead Conversion Layout check box.

      NOTE: By default, the Standard Lead Conversion Layout provided in Oracle CRM On Demand acts as the default lead conversion layout for the company unless another layout is marked as the default. If you create another layout, and select the Default Layout check box for the new layout, the Standard Lead Conversion Layout will no longer be the default. So, the Standard Lead Conversion Layout is the default layout for the company only when the Default Layout check box is deselected for any other layout. However, the Default Layout check box for the Standard Lead Conversion Layout always remains deselected, even when it is acting as the default.
6. In Step 2, Select Actions, highlight the record type for which you want to select the actions (Account, Contact, Opportunity, or Deal Registration) in the Lead Conversion Record Type section, and then click the arrows to move the actions you want to display on the page from the Lead Conversion Available Actions section to the Lead Conversion Selected Actions section. Repeat this step for each of the record types.
7. In Step 3, Select Fields, specify the lead fields that you want to carry over to the Opportunity and Deal Registration sections of the Convert Lead page when the user clicks Convert on the Lead Detail page, as follows:
   a. In the Lead Conversion Record Types list, select the record type for which you want to configure the fields for the Convert Lead page (Opportunity or Deal Registration).

      The Lead Conversion Selected Fields list initially shows the fields that are carried over by default. The Lead Conversion Available Fields list shows all of the additional fields that are available to be carried over to the Convert Lead page for that record type.

      NOTE: Only the fields that are mapped to fields in the relevant record type are available to be added to the Convert Lead page layout. If a field that you want to add to the Convert Lead page is not already mapped to fields on the relevant record type, then you must map it before you can add it to the layout of the Convert Leads page. In addition, concatenated fields and fields of the Web Link field type are not available to be added to a lead conversion layout, even if such fields are mapped to fields on the relevant record type. The Associated Opportunity field and the Next Step field always appear in the Opportunity section of the Convert Lead page, and the Deal Registration Name field and the Principal Partner Account field always appear in the Deal Registration section. You cannot remove these fields from the page layout. For more information, see Mapping Additional Fields During Lead Conversion (on page 1571).
   b. Move the fields that you want to the Lead Conversion Selected Fields list, and move any fields that you do not want to the Lead Conversion Available Fields list. The maximum number of fields that can be included in the Lead Conversion Selected Fields list for a record type is nine.
   c. Repeat steps a and b for the other record type (Opportunity or Deal Registration).
8. In Step 4, Confirm, review your selections, and if necessary, return to Step 2, Select Actions, or Step 3, Select Fields, to change your selections.
9. Click Finish to save your changes.

Reject Code for Leads

When users reject a lead, they must select a rejection code in the Reject Code field in the Reject a Lead page. Users can also enter a text description of the reason for the rejection in the Reject Reason field. If a user selects the *Other* value in the Reject Code field, the Reject Reason field becomes a required field, and the user must enter a description of why the lead was rejected. Otherwise, the Reject Reason field is optional.

A number of values are provided by default for the Reject Code field, but you can change these values, or add more values to the list. The default values are:

- 3rd Party Contact
- Do Not Contact Again
- Duplicate
- Failed to Reach Contact
- Inappropriate Contact
- Insufficient Data
- Invalid Phone Number
- No Business Opportunity
- Opportunity in Progress
- Other
- Recently Contacted (<30 days)
- Data Entry/System Error
- Already Owns Product
- Targeting Criteria Not Met

For information about editing picklist values, see Changing Picklist Values (on page 1254).

NOTE: If you rename the *Other* value, the Reject Reason field still becomes a required field when the user selects the renamed value in the Reject a Lead page.

About Restricting Reject Code Values

The Status field is displayed in the Reject a Lead page. It is read-only and is set to Rejected. You can restrict the values that are available for users to select in the Reject Code field in the Reject a Lead page by defining a cascading picklist that has the Status field as the parent picklist and the Reject Code field as the related picklist. For information about defining cascading picklists, see Defining Cascading Picklists (on page 1292). You can also disable reject code values, see Changing Picklist Values (on page 1254).

NOTE: You can use only the Status field as a parent pickilst to restrict the values in the Reject Code field.

Setting Up the Forecast Definition

Forecasts in Oracle CRM On Demand automate the generation of sales forecasts according to the settings that you define. Forecasts are generated automatically on either a weekly or monthly basis. Each generated forecast is saved to the archive, providing a historical record that you can refer to and analyze.

Every forecast is a snapshot of information about revenue and potential revenue for the quarter. Forecasts enable sales professionals and managers to track their quarterly sales performance against planned quotas, actual closed revenue, and expected revenue, given the current status of their sales opportunities.

Participants in forecasts are chosen by role. Your company's reporting structure, and the roles you choose for the forecast participants must be set up so that the participants roll up to one top-level user. Typically this top-level user is a company vice-president or chief executive officer (CEO).

When you generate a forecast, Oracle CRM On Demand alerts employees that the forecast has been created and is ready for review by posting an alert on My Homepage for each participant for two days. To extend the period during which the alert appears, update the Expiration Date field for that alert. For information on alerts, see Publishing Company-Wide Alerts (on page 1183).

Determining the Forecast Type

Your company can base its forecasts on any of the following: opportunities, products, accounts, or contacts. There are four types of forecasts:

- Opportunity product
- Opportunity revenue
- Account revenue
- Contact revenue

Your company can generate multiple forecast types on the specified forecast dates set for forecast generation. When you select the forecast settings for your company, you determine which forecast types your entire company uses.

NOTE: Each forecast type requires sales employees to take certain actions. Make sure to communicate which types of forecast you will be using before your sales employees begin creating opportunity, account, and contact records.

Opportunity Product Forecasts

Opportunity product forecasts report on the products linked to an opportunity. The forecast numbers for the opportunity product forecasts are calculated from the Quantity, Revenue, and Expected Revenue fields on all products that are owned by a forecast participant and have revenue that is scheduled to be recognized during the forecast period. The revenue for a product can be reported at one time, or it can be reported during several periods.

Opportunity product forecasts require sales representatives to link products to their opportunity records. Sales representatives must also fill in the quantity, purchase price, and the start and close date to indicate which products they want to include in their forecasts.

To be included in the forecast, an opportunity product record must:

- Have a close date during the forecast period
- Be owned by a forecast participant

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see About Opportunities and Forecasts.

Set up an opportunity product forecast if your company wants to forecast one-time or recurring revenue that is based on products.

Opportunity Revenue Forecast

Opportunity revenue forecasts report on the revenue noted in the opportunity records. The forecast numbers are calculated from the Revenue and Expected Revenue fields on all opportunity records where the following conditions apply:

- The opportunity has a close date during the forecast period
- One of the following is true:
  - The opportunity is owned by a forecast participant
  - A forecast participant is a member of the opportunity team and has a share of the opportunity revenue that is greater than zero percent (that is, the value in the Percentage Split field on the Opportunity Team page is greater than zero).

    NOTE: For revenue on an opportunity to be shared among team members, the Enable Opportunity Revenue Split check box must be selected on the company profile.

Opportunity revenue forecasts require sales representatives to fill in the opportunity Revenue and Close Date fields to indicate which opportunities they want to include in their forecasts. Any linked products are ignored in the forecast.

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see About Opportunities and Forecasts (on page 309).

Set up an opportunity revenue forecast if you want to forecast total opportunity revenue, regardless of how much revenue comes from individual products.

Account and Contact Revenue Forecasts

Account revenue and contact revenue forecasts report on the revenue listed on revenue records that are linked to account or contact records. The forecast numbers are calculated from the Revenue and Expected Revenue fields for the records that meet the criteria for inclusion in the forecast. To be included in the forecast, an account or contact revenue record must meet the following conditions:

- The record must be owned by a forecast participant.
- The record must have a status of Open, Pending, or Closed.
- The record must have the Forecast field selected.
- The record cannot be linked to an opportunity.
- The record must have revenue that is scheduled to be recognized during the forecast period.

The revenue for an account or contact can be reported at one time, or it can be set up to recur over time. Account revenue and contact revenue forecasts require users to link revenues to their account or contact records. Users must also update the Start/Close date, Status, and Forecast fields on the revenue record to indicate which products they want to include in their forecasts.

Some additional information must be provided for a record's values to contribute to your company's forecast revenue. For detailed information, see Tracking Revenue Based on Accounts (on page 280), and Tracking Revenue Based on Contacts (on page 299).

Set up an account or contact revenue forecast if your company wants to forecast one-time or recurring revenue.

Selecting Forecast Duration

You can configure forecasts to display revenue projections for up to four quarters. With the extended forecast capability, you can view a forecast for the current quarter, and for the following one, two, or three quarters.

By default, the forecast duration is set to one quarter (meaning only the current quarter is included in the forecast). When you change the duration setting to include multiple quarters, the forecast includes the current quarter as well as future quarters. For example, if you select a two-quarter forecast duration, the forecast includes the current quarter and the next quarter.

Designating Forecast Roles

As part of your forecast definition, you select which roles are to be included. When you add a role to the forecast definition, all users who are assigned that role are designated as forecast participants.

User Setup for Forecasts

The users that you intend to include in your company's forecasts must be set up correctly. Their user records must meet the following conditions:

- The record must have a valid value in the Role field.
- The record must have a valid value in the Reports To field or in the Reports To (Alias) field, depending on which of these fields appears on the page layout for the user record.
- The status of the user must be set to Active unless you select the option to allow forecasts for inactive users.

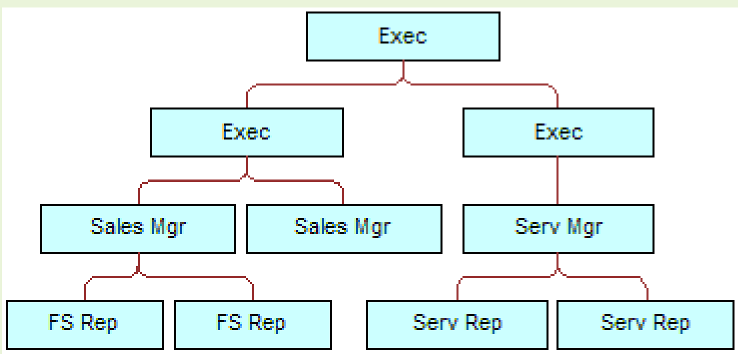
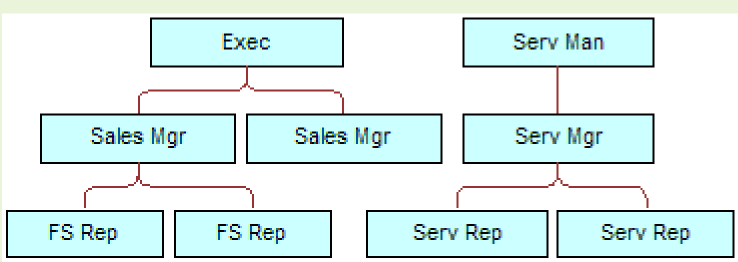
CAUTION: If any of the users included in the forecast are set up incorrectly, the entire forecast will fail.

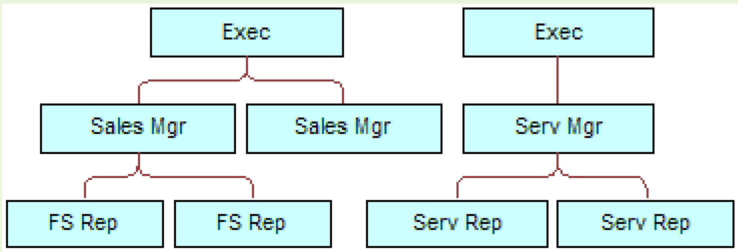
Examples of Reporting Structures and Roles for Forecasting

To generate forecasts you must set up your company's reporting structure correctly. The forecast hierarchy is based on the hierarchy specified in the Reports To or Reports To (Alias) field on the user records. All forecast participants, except for one top-level user, must report to another forecast participant, so that all individual forecasts roll up to one company-wide forecast. If there is more than one forecast participant who does not report to another forecast participant, or if any manager with forecast participants as direct reports has a status of Inactive, then the forecast will fail.

NOTE: If the forecast fails to generate because of a problem with the reporting structure, the primary contact (indicated on the company profile) receives an email notification from Customer Support. After the reporting structure has been corrected and the forecast has been updated, the forecast is automatically generated that night, even though it is not the usual forecast night.

The following table shows reporting structure and participant role combinations that work and don't work for forecast generation.

<table>
<tr><th>For This Reporting Structure</th><th>Forecasting Works or Fails</th><th>Because</th></tr>
<tr><td rowspan="3">
</td><td>Works with this role combination:
- Executive
- Sales Manager
- Field Sales Rep</td><td>Participants roll up to one top-level participant.</td></tr>
<tr><td>Fails with this role combination:
- Sales Manager
- Field Sales Rep</td><td>Participants do not roll up to one participant. They roll up to two sales managers.</td></tr>
<tr><td>Fails with this role combination:
- Executive
- Field Sales Rep</td><td>The field sales reps roll up to a sales manager who is not a participant.</td></tr>
<tr><td>
</td><td>Works with this role combination:
- Executive
- Sales Manager
- Field Sales Rep</td><td>Participants roll up to one participant.</td></tr>
</table>

For This Reporting Structure	Forecasting Works or Fails	Because
	Fails with this role combination: - Executive - Sales Manager - Field Sales Rep	Two participants report to no one. Only one participant in the forecast (at the top of the structure) can report to no one.

Including Inactive Users in Forecasts

Forecasts can include inactive users as well as active users. When you set up your forecast definition, you indicate whether inactive users are to be included in the forecasts.

Allowing Managers to Submit Forecasts for their Direct Reports

When you set up your forecast definition, you indicate whether managers can automatically submit forecasts for their direct reports when they submit their forecasts.

Forecasts and Custom Fiscal Calendars

When using custom fiscal calendars, your company's custom fiscal calendar definition are used in the generation of forecasts and therefore the forecast period months align with the custom fiscal calendar months.

Your company administrator must create a custom fiscal calendar record for each year for which you want to create forecasts in Oracle CRM On Demand. If a sufficient number of fiscal calendars needed to support the selected forecast duration have not been created, it prevents the forecast series from generating and forecasts from being created.

NOTE: If the forecast fails to generate because of insufficient fiscal calendars, the primary contact (indicated on the company profile) receives an email notification from Customer Support. After the fiscal calendar records to support the forecast definition have been created, and the forecast definition has been updated, the forecast is automatically generated that night, even though it is not the usual forecast night.

About the Email Notifications for Forecast Failures

In the email notifications that are sent when forecasts fail, the From address is always donotreply@crmondemand.com and the Sender field is always set to support@crmondemand.com. Oracle CRM On Demand appends a string to each email so that the email can be tracked in the email delivery system at Oracle. If the email recipient attempts to respond to the email, then the address in the To field in the reply is automatically set to support@crmondemand.com.

The following procedure describes how to set up the forecast definition.

To set up the forecast definition

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules & Assignment link.
3. Under the Forecast Administration section, click Forecast Definition.
4. On the Forecast Definition page, click Update.
5. In Step 1, Select Forecast Types, select the Active check box for each forecast type that you want to generate.

Your company can forecast sales revenue that is based on opportunity products, opportunity revenue, account revenue, and contact revenue.

6 In Step 2, Select Forecast Frequency:

   a In the Forecast Duration field, select the forecast duration.

   NOTE: The fiscal calendar settings selected for your company determine the duration of each quarter. The start date and end date of the forecast duration will be calculated according to the fiscal calendar start date and fiscal calendar type set on your company profile. For the fiscal calendar type of Custom Fiscal Calendar, the start and end dates are based upon the fiscal calendar as defined by your company administrator.

   b In the Create Forecast Snapshot Each field, specify how frequently the forecast snapshot is to be created.

   You can select weekly or monthly or monthly forecasts.

   NOTE: If you select Month, the selected fiscal calendar type for your company determines the length of the month.

   c In the Forecast Snapshot Day field, select the day of the month or the week that the forecast snapshot is to be created.

   Forecasts are generated at the start of the selected day (that is, at one minute past midnight) in the time zone of the hosting facility. If your forecast is monthly and the current month does not contain the day selected as the day for the forecast to be generated, Oracle CRM On Demand adjusts the snapshot to generate a forecast on the last day of the month. For example, if the Forecast Snapshot Day is set to the 30th, and the current month is February, Oracle CRM On Demand adjusts the forecast snapshot to generate the forecast on the 28th.

7 In Step 3, Select Forecast Roles:

   a Add the roles for those users who are to participate in the forecast to the Forecasting Roles area. Click the arrows to move company roles to the Forecast Roles list.

   b To allow forecasts for inactive users, select the Allow Forecasts for Inactive Users check box.

   c To allow a manager to submit forecasts automatically for their direct reports, select the Auto-submit forecasts for team upon manager submit check box.

8 Click Finish.

9 On the Forecast Definition page, verify the forecast details by reviewing the forecast snapshot frequency, the forecast snapshot day, next forecast series dates, and the list of forecast series participants.

CAUTION: After you set up your forecast definition, certain changes to user records or fiscal calendars require you to update your forecast definition settings. For more information, see Updating the Forecast Definition (on page 1580).

Updating the Forecast Definition

You can update your company's forecast definition to change the forecast frequency, or to add or remove roles, and so on. In addition, when certain changes are made to user records, or if your fiscal calendar is modified, you must update the forecast definition so that it incorporates the changes.

You must update your forecast definition when any of the following changes are made:

- The manager for a forecast participant is changed. The manager information is stored on the user record of the forecast participant in the Reports To field or the Reports To (Alias) field, depending on which of these fields appears on the page layout for the user record.

  If the manager for a forecast participant is changed, then you must update the forecast definition as follows:

  - If the role assigned to the new manager is not currently included in the forecast definition, then you must add the role to the forecast definition.

  - If the role assigned to the new manager is currently included in the forecast definition, then you must refresh the forecast definition so that the new reporting structure is reflected in future forecasts.

    NOTE: The forecast participant hierarchy must include managers for everyone except the person at the top level.

- Users who are participants in the forecast hierarchy are deactivated.

  When an employee leaves your company, you must change the status for that user to Inactive. If the inactive employee was a manager in the forecast hierarchy, then the user record of any forecast participant who reports to that employee must also be updated.

  In this case, you must update the forecast definition as follows:

  - If the role assigned to the new manager is not currently included in the forecast definition, then you must add the role to the forecast definition.
  - If the role assigned to the new manager is currently included in the forecast definition, then you must refresh the forecast definition so that the new reporting structure is reflected in future forecasts.

    NOTE: If your forecast definition allows forecasts for inactive users, then you do not need to update the forecast definition when a forecast participant is made inactive.

- Users are added to, or removed from the roles included in the forecast definition.

  In this case, you only need to refresh the forecast definition so that it incorporates the changes.
- Changes are made to your fiscal calendar.

  In this case, you only need to refresh the forecast definition so that it incorporates the changes.

  NOTE: You must refresh the forecast definition when a change is made to your fiscal calendar, regardless of the type of fiscal calendar your company uses (standard or custom).

NOTE: When any of the changes described here are made in Oracle CRM On Demand, the forecasts that are generated do not reflect the changes until the forecast definition is updated.

The following procedure describes how to update the forecast definition.

To update the forecast definition

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules & Assignment link.
3. Under the Forecast Administration section, click Forecast Definition.
4. On the Forecast Definition page, click Update.
5. In Step 1: Select Forecast Type, if any changes are needed, make the changes.
6. Click Step 2: Select Forecast Frequency.
7. If any changes are needed in Step 2: Select Forecast Frequency, make the changes.
8. Click Step 3: Select Forecast Roles.
9. If any changes are needed in Step 3: Select Forecast Roles, make the changes.
10. Click Finish.

    Your forecast definition is automatically updated and a summary of the definition, including the updated list of forecast participants, is displayed on the Forecast Definition page.

Setting Up Sales Processes, Categories, and Coaches

You can create a customized sales methodology that reflects the requirements and complexity of your sales environment, and guides your sales representatives as they work on deals at various sales stages.

You can adjust the sales stage information to reflect your company's sales process or business practices. When employees create and update opportunities, they select a sales stage that represents how far along the opportunity is in the sales process. Each sales stage is tied to a percentage. That information is used with reports and forecasts, including your pipeline, expected revenue, and closed revenue calculations.

As part of customizing the sales stage values themselves, you can:

- Rename the sales stages
- Add or delete sales stages
- Change the sequence of the sales stages
- Change the probability percentages associated with the sales stages

About Sales Processes

Some sales environments require only one sales process with one set of sales stages. Other sales environments are more complex and require multiple sales processes with distinct sales stages for each process. For example, internal sales representatives might follow a different sales process from the one followed by field sales representatives.

Additionally, sales representatives might need to follow different sales processes for different types of opportunities. For example, when your sales representatives are selling a piece of equipment, they might need to follow a longer, multi-stage sales process. But when they are selling a service contract, the process might be shorter and have fewer sales stages.

To further refine your sales methodology, you can define series of sales stages as sales processes and link each process to one of these:

- Opportunity type
- User's role

This allows you to customize the sales process (and sales stages with each process) for different opportunity types or different user roles.

Example: Your sales representative creates a new opportunity. When entering information about the opportunity, she selects Service from the Opportunity Type options. This causes the application to display the sales process appropriate for that opportunity type.

NOTE: The sales process based on opportunity type overrides the defaulted sales process based on a user's role. In other words, when an employee creates an opportunity, her role's default sales process is assigned to the opportunity. If she then selects an opportunity type that has an assigned sales process, the sales process for the opportunity is then driven based on the opportunity type she selected.

About Sales Stages in Searches and List Filters

The sales stages that a user can select in search criteria and list filters are determined as follows:

- In a targeted search of the Opportunity record type in the Action bar, if the Sales Stage field is available as a search field, then a user can select only the sales stages that are associated with the sales process that is specified for the user's role or the sales stages for the default sales process, if no sales process is specified for the user's role. The available sales stages are not limited by the opportunity type, even if the Opportunity Type field is available as a search field in the Action bar, and the user selects an opportunity type for the search.
- In an advanced search of the Opportunity record type, a user can select any of the sales stages that exist in Oracle CRM On Demand as filter values for the Sales Stage field. The available filter values are not limited to the sales stages for a specific sales process, even if a default sales process is specified for the role of the user who performs the search, or the user selects an opportunity type as a filter for the search.
- When setting up a list filter for the Opportunity record type, a user can select any of the sales stages that exist in Oracle CRM On Demand as filter values for the Sales Stage field. The available filter values are not limited

to the sales stages for a specific sales process, even if a default sales process is specified for the role of the user who creates the list, or the user selects an opportunity type as a filter for the list.

About Sales Stage Categories

You can also set up sales stage categories, such as Stage 1, 2, or 3, which you can link to specific sales stages across different sales processes. When you need to consolidate information from different processes, you can run reports against the sales stage categories, providing an accurate view of your pipeline across all opportunity types or roles.

About Sales Process Coach

You can also use the Sales Process Coach to guide your team through completing the necessary information accurately at each sales stage. The Sales Process Coach provides specific steps for employees to follow as well as useful information, such as documents, templates, and competitive information. You can also enforce the collection of information based on how opportunities progress through the sales cycle. In addition, when an opportunity record is saved, you can specify that certain tasks are automatically created, which appear in your employee's task list.

As part of the sales process coach, you can:

- Add information for each sales stage that employees access through the Coach button
- Set up requirements for each sales stage, such as fields to be filled in. These serve as prerequisites before saving the opportunity at a new stage.
- Set up automated tasks that are generated when employees save their opportunities with different sales stages

If you change any Sales Stage names after the system has been deployed, all previous records maintain their assigned Sales Stage until you manually update them.

NOTE: To change the default picklist values for the Probability % field, you need to edit that field from the Opportunity Field Setup page (see Changing Picklist Values (on page 1254)).

When setting up your sales methodology, follow this general process:

1. Set up the sales stage categories (if you have more than one sales process).
2. Set up the sales process (or processes).
3. Set up the sales stages for each sales process.
4. Set up the coaching feature for the sales stages.

Before you begin:

- To perform this procedure, your role must include the Manage Data Rules - Manage Sales Stage Definition privilege.
- If you want to assign a sales process based on the Opportunity Type field, make sure the picklist values are the ones you want to use. The default Opportunity Type values are Renewal and New Business. For instructions on customizing picklist values, see Changing Picklist Values (on page 1254).

  Also, make sure that the Opportunity Type field appears in the page layout for each role you want to use it with. For instructions, see Customizing Static Page Layouts (on page 1267).

To set up a sales stage category (optional)

1. In the upper right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules & Assignment link.
3. In the Sales Methodology section, click the Sales Categories link.
4. From the Translation Language list, select your company's primary language.

5 On the Sales Stage Categories page, click New to create a new sales stage category, or select Edit from the record-level menu for the sales stage category you want to edit.

6 On the Edit Sales Stage Category page or the New Sales Stage Category page, complete the required information.

Field	Description
Stage Category	The name of the sales stage category.
Order	The sequence of the sales stage categories as they appear in Oracle CRM On Demand.
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company, select the Mark for Translation check box. When you add a new sales stage category name, the Mark for Translation check box is read-only. New names that you add automatically appear (without brackets and in black text) in the other activated languages. If you select the Mark for Translation check box when you update the name of a sales stage category, the updated name appears in the picklists for the other activated languages (in blue text with brackets) until you manually enter the translated versions. The blue text helps you to track which terms must be translated. If you do not select the Mark for Translation check box, the updated name does not appear in the other languages, and the other languages are not affected by the changes that you make on this page.

7 Save the record.

8 To manually enter the translated equivalent of the new sales stage category:

   a From the Translation Language list, select the language.

   b Click the Edit link for the sales stage category.

   c Enter the translated equivalent in the Stage Category field, and click Save.

To set up a sales process

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

2 In the Business Process Management section, click the Data Rules & Assignment link.

3 In the Sales Methodology section, click the Sales Processes link.

4 From the Translation Language list, select your company's primary language.

5 On the Sales Process List page, click New to create a new sales process or select Edit from the record-level menu for the sales process you want to edit.

6 On the Sales Process Edit page, complete the required information.

Field	Description
Default Sales Process	Company’s default sales process. If no other sales process is assigned to your user role or to the opportunity type for the record, this sales process is used.

Field	Description
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company, select the Mark for Translation check box.

7 Click Save.

8 To link the sales process to an Opportunity Type field value:

   a On the Sales Process List page, click the Sales Process Name you want to link.

   b In the Associated Opportunity Types title bar, click Add.

   c Select the Opportunity Type, and click Save.

   NOTE: You can link only one sales process to each opportunity type. After you do that, the opportunity type value is removed from the picklist for selection with other sales processes. This prevents you from linking more than one sales process to an opportunity type.

   When employees have records with the Opportunity Type field corresponding to the value you selected, they see the sales stages for this sales process.

9 To manually enter the translated equivalent of the new sales process:

   a Go back to the Sales Process List page.

   b From the Translation Language list, select the language.

   c Click the Edit link for the sales process.

   d Enter the translated equivalent in the Sales Process field and click Save.

10 To select the sales process to use as the default:

   a On the Sales Process List page, click the Sales Process Name link of the sales process you want to set as the default.

   b Click Edit.

   c Select the Default Sales Process check box.

   d Save the record.

   NOTE: This sales process is displayed for records or roles that have no other linked sales process.

To set up sales stages for a sales process

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

2 In the Business Process Management section, click the Data Rules & Assignment link.

3 In the Sales Methodology section, click the Sales Processes link.

4 On the Sales Process List page, click the Sales Process Name link.

5 To set up a sales stage:

   a In the Sales Stage title bar, click New to create a new sales stage, or select Edit in the record-level menu of the sales stage you want to edit.

   b On the Sales Stage Edit page, complete the required information.

Field	Description
Default Probability	A percentage that reflects the confidence that the deal will close with the specified revenue on the specified close date. By default, the probability assigned to an opportunity adjusts automatically based on the sales stage of the opportunity. Users can manually override this value, but when a user selects a new sales stage for the opportunity, the value in the Probability percentage field of the opportunity is automatically updated to the default probability value for the new sales stage. **NOTE:** If the Mass Update feature is used to change the value in the Sales Stage field on one or more opportunity records, then the value in the Probability percentage field of the records is not updated to the default probability percentage for the new sales stage. **Important:** Do not set up any other Sales Stages with probabilities equal to 0 or 100 percent except Closed/Lost and Closed/Won. Modifying picklists that are used internally by the Oracle CRM On Demand application can have an adverse impact on standard functionality.
Order	Sequence of the Sales Stages as they appear in the picklist. If you add a Sales Stage, you need to change the order value for all subsequent Sales Stages. This way, you can be sure that the Sales Stage drop-down list in the Opportunity pages has the information in the correct order.
Mark for Translation	(Optional) To indicate that an updated (not new) name needs to be translated to other languages activated for your company, select the Mark for Translation check box.
Stage Category	The name of the sales stage category that this sales stage falls under.

6 Save the record.

7 To manually enter the translated equivalent of the new sales stage:

   a On the Sales Process Detail page, in the Sales Stage section, click Show Full List.

   b In the Sales Stage page, in the Translation Language field, select the language.

   c Click the Edit link for the sales stage.

   d Enter the translated equivalent in the Sales Stage Name field and click Save.

8 Save the record.

To set up the coaching feature for the sales stages

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

2 In the Business Process Management section, click the Data Rules & Assignment link.

3 In the Sales Methodology section, click the Sales Processes link.

4 From the Translation Language list, select your company's primary language.

   If you do not select your company's primary language, the Mark for Translation check box does not appear, and the application does not indicate untranslated terms you add here.

5 On the Sales Stage List page, click the sales stage link (in the Sales Stage column) you want to set up the coaching information for.

6 To make a field required for this sales stage:

a In the Additional Required Fields title bar, click New.

b On the Edit Additional Required Field page, select the field from the list.

c Review the tips for entering default values that appear onscreen, and then enter the value you want to have as the default (optional).

When you enter a default value, the default value is added to the record only if that field is blank. For example, if the record already has a Revenue value, specifying a default value for Revenue here will not cause the revenue amount already saved in the record to be overwritten.

d Save the record.

7 To add guidelines for the sales stage for your employees to review, such as objectives and milestones to be achieved in the stage:

a In the Process Coach Steps title bar, click New.

b On the Process Coach Step Edit page, enter a number to indicate the sequence for this information to appear.

When employees click the Coach button from their opportunity records, they can see the first 10 substeps. If you add more than 10, employees can view the entire list by clicking the Show Full List link.

c To mark the information for translation, select the Mark for Translation check box.

d Save the record.

When employees click the Coach button from their opportunity records for an opportunity record with this sales stage, this information appears on their Sales Process Coach page.

8 To add an attachment or URL for employees to access resources appropriate to the sales stage:

a In the Useful Resources title bar, click Add Attachment or Add URL.

b On the Attachment Edit or URL Edit page, enter the information.

c Save the record.

When employees click the Coach button from their opportunity records, the list of attachments or URLs linked to this sales stage appears on their Sales Process Coach page.

9 To define tasks that are automatically created when employees update the sales stage:

a In the Automated Tasks title bar, click New.

b On the Automated Tasks Edit page, enter the information.

The information you set up here serves as a template for each task. The newly-created task is linked to this opportunity, so it appears on the Opportunity Detail page as well as the appropriate activity lists.

NOTE: You must enter a number in the Due Date field to indicate how many days after the task is created that the task is due. For example, if the task is created on December 6 and you entered 10 here as the Due Date, the task appears on the employee's task lists as due on December 16.

For Owner, the following behavior applies:

- The task is created for every user having the role you select.
- If no user fulfills the account team role, the task is assigned to the opportunity owner.

NOTE: For information about how record ownership modes affect the ownership of automatically generated tasks, see Record Ownership Modes and Automatically Generated Tasks (on page 1432).

c Save the record.

Customizing Your Company's Industry List

The Industry field is a picklist field on a number of record types, including the Account, Application, Lead, and Partner record types. It is used to track the type of business that is associated with a record. You can add and remove industries, or change the display name of industries in the list, which enables you to change the industry picklist to match the nomenclature that your company uses.

NOTE: The number of industries that you can add to the list is not limited. However, only the first 300 active industries in the list are available for users to select in the picklist of values in the Industry field on a record detail page. The industry values are sorted in ascending ASCII code order, which means that the sort order is case sensitive. The values that start with a number appear first, followed by the values that start with an uppercase letter, followed by the values that start with a lowercase letter. An industry is active when the Enabled check box is selected for the industry.

The following procedure describes how to update an industry.

To update an industry

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules and Assignment link.
3. In the Industry Definition section, click the Industry Definition link.
4. In the Industry Edit page, change the information for the industry as necessary.
5. Save your changes.

The following procedure describes how to add an industry.

To add an industry

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules and Assignment link.
3. In the Industry Definition section, click the Industry Definition link.
4. In the Industry Edit page, in the Translation Language field, select your company's primary language, and then click New.
5. In the new Industry Edit page, enter the information for the industry.
6. Save your changes.

NOTE: The Industry SIC Code is one of the fields on the Industry Edit page. The Standard Industrial Classification (SIC) system is a series of numeric codes that classify all businesses by the types of products or services they make available. Businesses engaged in the same activity, whatever their size or type of ownership, are assigned the same SIC code. The SIC codes were developed to facilitate the collection, tabulation, and analysis of data; and also to improve the comparison of statistical analyses.

The following procedure describes how to enter the translated equivalent of an industry manually.

To manually enter the translated equivalent of an industry

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click the Data Rules and Assignment link.
3. In the Industry Definition section, click the Industry Definition link.
4. In the Industry Edit page, in the Translation Language field, select the language.
5. Enter the translated equivalent in the Display Name field.
6. Save your changes.

NOTE: When your company is first set up in Oracle CRM On Demand, the default names and the display names of the industries are generated in the default language for your company. If the default language for your company is later changed, then the display names of the industries appear in the new language. However, the default names of the industries continue to appear in the language that was originally the default language for your company.

Modification Tracking

As an administrator, you can track run-time modifications to record types using the modification tracking feature. When you enable the modification tracking feature for a record type, Oracle CRM On Demand logs all change events for that record type and writes a modification tracking record to the modification tracking event list. Oracle CRM On Demand permanently deletes old modification tracking records whenever a regular purge of deleted items occurs. An old record is defined as a record that is 30 days or older.

External applications that integrate with Oracle CRM On Demand, such as Oracle CRM On Demand Disconnected Mobile Sales, can use the modification tracking feature. In addition, external applications can read modification tracking entries using Web services. For information about using Web services to read modification tracking entries, see *Oracle Web Services On Demand Guide*.

Related Topics

For related information on the modification tracking feature, see the following topics:

- Enabling the Modification Tracking Feature (on page 1589)
- Record Types that are Tracked (on page 1590)
- About Modification Tracking Events (on page 1602)
- Viewing the Modification Tracking List Page (on page 1604)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 1601)
- Examples of Modification Tracking Event Records (on page 1605)
- Creating Modification Records Manually (on page 1608)

Enabling the Modification Tracking Feature

Use the following procedure to enable the modification tracking feature in Oracle CRM On Demand for all modules.

Before you begin. You must be signed in to Oracle CRM On Demand as administrator, and your role must include both the Manage Modification Tracking privilege and the Manage Roles and Access privilege. If the Manage Modification Tracking privilege is not enabled for your company administrator's role, then contact Oracle CRM On Demand Customer Care.

To enable the modification tracking feature for record types

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Enable Modification Tracking.
3. On the page that opens, select the Enable Modification Workflows check box for the record types (or object names) that you want to track.

   NOTE: You can disable the modification tracking feature for a record type by deselecting the Enable Modification Workflows check box for that record type.

   You can view the relevant modification information listed in the Modification Tracking List page by going to the Admin Homepage and clicking Modification Tracking in the Business Process Management section.

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 1589)
- Record Types that are Tracked (on page 1590)
- About Modification Tracking Events (on page 1602)
- Viewing the Modification Tracking List Page (on page 1604)

- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 1601)
- Examples of Modification Tracking Event Records (on page 1605)
- Creating Modification Records Manually (on page 1608)

Record Types That Are Tracked

This topic lists the record types for which Oracle CRM On Demand tracks change events. To use the modification tracking feature, you must select these record types. The record type names that are displayed on the Modification Tracking List page match the record type names displayed elsewhere in the Oracle CRM On Demand user interface. The record type names used in Oracle CRM On Demand Web service requests to retrieve modification tracking information must match the names as listed in the right-hand column in the following table.

NOTE: The record type names in the right-hand column are language independent.

The following table lists the record types that you can enable for the modification tracking feature in Oracle CRM On Demand.

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Account	Account
Account Address	AccountAddress
Account Book	AccountBook
Account Competitor	Competitor
Account Contact	AccountContact
Account Contact Role	ContactRole
Account Event	AccountEvent
Account Note	Note
Account Partner	Partner
Account Relationship	RelatedAccount
Account Team	AccountTeam
Accreditation	Accreditation
Accreditation Book	AccreditationBook
Accreditation Request	AccreditationRequest
Accreditation Team	AccreditationTeam
Activity	Activity

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Activity Attachment	Attachment
Activity User	User **NOTE:** If you want to track the changes for Activity User through the Owner field or the User related information section, then you must select the Activity, Activity User, User, and Position record types for modification tracking. By selecting these four record types, Oracle CRM On Demand properly tracks the Associate, WriteRecordUpdated, and Dissociate events when users are added or removed from an activity. It also generates the PreDeleteRecord and DeleteRecord change events for the Activity User intersection table when a user is deleted from an activity.
Address	Address **NOTE:** If you enable modification tracking for address records for your company and geocoding is also enabled in the company profile, then Oracle Maps Geocoder generates modification tracking entries for every address update it makes. You can track the updates that are made to the address records through the modification numbers in the associated modification tracking records for addresses.
Address Location	Address
Allocation	Allocation
Allocation Book	AllocationBook
Application	Application
Application Book	ApplicationBook
Application Team	ApplicationTeam
Assessment	SalesAssessment
Assessment Value	SalesAssessmentValue
Asset	Asset
Auto Dealer Make	AutoDealerMakes
Auto Sales Hours	AutoSalesHours

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Auto Service Hours	AutoServiceHours
Blocked Product	BlockedProduct
Book	Book
Book User	BookUser
Broker Profile	BrokerProfile
Business Plan	BusinessPlan
Business Plan Book	BusinessPlanBook
Business Plan Team	BusinessPlanTeam
Call Product Detail	ProductsDetailed
Call Product Detail Message Response	CallProdDetailMsgRsp
Call Product Detail Messaging Plan Item	CallProdDetailMsgPlanItem
Call Product Detail Messaging Plan Item Relations	CallProdDetailMsgPlnRel
Call Promotional Items Dropped	PromotionalItems
Call Sample Dropped	SampleDropped
Campaign	Campaign
Campaign Book	CampaignBook
Campaign Recipients	Recipient
Certification	Certification
Certification Book	CertificationBook
Certification Request	CertificationRequest
Certification Team	CertificationTeam
Claim	Claim
Contact	Contact

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Contact Address	ContactAddress **NOTE**: If a user removes an address from a Contact Detail page when the company is not enabled for shared addresses, then the modification tracking functionality only tracks the Dissociate event, the WriteRecordUpdated event for the contact record, and the PreDeleteRecord event for the address record. The functionality does not track the DeleteRecord event for the address record. To identify the address removed, refer to the PreDeleteRecord event.
Contact Best Time	ContactBestTimes
Contact Book	ContactBook
Contact Interests	Interests
Contact Note	Note
Contact Portfolio	Contact
Contact Relationship	RelatedContact
Contact State License	ContactLicense
Contact Team	Team
Course	Course
Course Book	CourseBook
Course Enrollment	CourseEnrollment
Course Team	CourseTeam
Coverage	Coverage
Custom Object 01	CustomObject1
Custom Object 01 Book	CustomObject1Book
Custom Object 01 Team	Team
Custom Object 02	CustomObject2
Custom Object 02 Book	CustomObject2Book

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Custom Object 02 Team	Team
Custom Object 03	CustomObject3
Custom Object 03 Book	CustomObject3Book
Custom Object 03 Team	Team
Custom Object 04	CustomObject4
Custom Object 04 Book	CustomObject4Book
Custom Object 04 Team	CustomObject4Team
Custom Object 05	CustomObject5
Custom Object 05 Book	CustomObject5Book
Custom Object 05 Team	CustomObject5Team
Custom Object 06	CustomObject6
Custom Object 06 Book	CustomObject6Book
Custom Object 06 Team	CustomObject6Team
Custom Object 07	CustomObject7
Custom Object 07 Book	CustomObject7Book
Custom Object 07 Team	CustomObject7Team
Custom Object 08	CustomObject8
Custom Object 08 Book	CustomObject8Book
Custom Object 08 Team	CustomObject8Team
Custom Object 09	CustomObject9
Custom Object 09 Book	CustomObject9Book
Custom Object 09 Team	CustomObject9Team
Custom Object 10	CustomObject10

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Custom Object 10 Book	CustomObject10Book
Custom Object 10 Team	CustomObject10Team
Custom Object 11	CustomObject11
Custom Object 11 Book	CustomObject11Book
Custom Object 11 Team	CustomObject11Team
Custom Object 12	CustomObject12
Custom Object 12 Book	CustomObject12Book
Custom Object 12 Team	CustomObject12Team
Custom Object 13	CustomObject13
Custom Object 13 Book	CustomObject13Book
Custom Object 13 Team	CustomObject13Team
Custom Object 14	CustomObject14
Custom Object 14 Book	CustomObject14Book
Custom Object 14 Team	CustomObject14Team
Custom Object 15	CustomObject15
Custom Object 15 Book	CustomObject15Book
Custom Object 15 Team	CustomObject15Team
NOTE: Your company might have set up additional custom objects and their child objects, which extend beyond Custom Object 15. These additional custom objects, along with their child objects, follow the same naming pattern as the preceding custom objects and their child objects.	
Damage	Damage
Deal Registration	DealRegistration
Deal Registration Book	DealRegistrationBook
Deal Registration Team	DealRegistrationTeam

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Dealer	Dealer
Dealer Territory	ChannelPartnerTerritory
Default Book by Record Type	UserUserDefaultBookPerType
Division	Division
Event	MedEd
Event Book	MedEdBook
EventTeam	MedEdTeam
Exam	Exam
Exam Book	ExamBook
Exam Registration	ExamRegistration
Exam Team	ExamTeam
Financial Account	FinancialAccount
Financial Account Book	FinancialAccountBook
Financial Account Holder	FinancialAccountHolder
Financial Account Holding	FinancialAccountHolding
Financial Plan	FinancialPlan
Financial Plan Book	FinancialPlanBook
Financial Product	FinancialProduct
Financial Transaction	FinancialTransaction
Fund	Fund
Fund Book	FundBook
Fund Debits	FundDebit
Fund Item	OccamFundCredit

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Fund Membership	FundPartner
Fund Participant	FundParticipantUserSharing
Fund Request	FundRequest
HCP Contact Allocation	HCPContactAllocation
HCP Contact Allocation Book	HCPContactAllocationBook
Household	Household
Household Contact	Contact
Household Team	Team
Insurance Property	InsuranceProperty
Inventory Audit Report	InventoryAuditReport
Inventory Audit Report Book	InventoryAuditReportBook
Inventory Period	InventoryPeriod
Inventory Period Book	InventoryPeriodBook
Invitee	Invitee
Involved Party	InvolvedParty
Lead	Lead
Lead Book	Book
Lead Event	LeadEvent
Lead Partner	Partner
Lead Team	LeadTeam
MDF Request	MDFRequest
MDF Request Book	MDFRequestBook
MDF Request Team	MDFRequestTeam

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Message Response	MessageResponse
Messaging Plan	MessagePlan
Messaging Plan Book	MessagePlanBook
Messaging Plan Item	MsgPlanItem
Messaging Plan Item Relations	MsgPlanItemRelation
Objective	Objectives
Objective Book	ObjectivesBook
Objective Team	ObjectivesTeam
Opportunity	Opportunity
Opportunity Book	Book
Opportunity Competitor	Competitor
Opportunity Contact Role	OpportunityContactRole
Opportunity Event	OpportunityEvent
Opportunity Note	Note
Opportunity Partner	Partner
Opportunity Team	Team
Order	Order
Order Book	OrderBook
Order Item	OrderItem
Order Team	OrderTeam
Partner	Partner
Partner Book	PartnerBook
Partner Program	Program

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Partner Team	PartnerTeam
Period	CRMOD_LS_Period
Picklist	Picklist (Administrative API)
Picklist Value Group	PicklistValueGroup
Plan Account	PlanAccount
Plan Contact	PlanContact
Plan Opportunity	PlanOpportunity
Policy	Policy
Policy Book	PolicyBook
Policy Holder	PolicyHolder
Portfolio	Portfolio
Portfolio Team	Team
Position	User **NOTE:** The Position record contains the record ownership information for the Account, Contact, Opportunity, Event, and Activity record types. To track the record ownership in these record types, you must enable Position for modification tracking. Specifically, this enabling tracks the Associate and Dissociate events for the user when the owner is changed for the supported record types. In addition, it tracks the Associate event between an activity and a user when the user is added to the Activity User Related Information section.
Price List	PriceList
Price List Line Item	PriceListLineItem
Product	Product
Product Category	ProductCategory
Product Indication	ProductIndication

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Program Book	ProgramBook
Program Membership	ProgramPartner
Quote	Quote
Related Disclaimer	RelatedDisclaimer
Revenue	Product
Sample Disclaimer	SampleDisclaimer
Sample Inventory	SampleInventory
Sample Lot	SampleLot
Sample Lot Book	SampleLotBook
Sample Request	SampleRequest
Sample Request Book	SampleRequestBook
Sample Request Item	SampleRequestItem
Sample Transaction	SampleTransaction
Sample Transaction Book	SampleTransactionBook
Service Request	ServiceRequest
Service Request Team	ServiceRequestTeam
Signature	Signature
Smart Call	Activity
Social Media	SocialMedia
Solution	Solution
Solution Book	SolutionBook
Special Pricing Product	SPRequestLineItem
Special Pricing Request	SPRequest

Record Type in Oracle CRM On Demand User Interface	Record Type in Oracle CRM On Demand Web Services
Special Pricing Request Book	SPRequestBook
Special Pricing Request Team	SPRequestTeam
Territory	Territory
Transaction Item	TransactionItem
User	User
User Division	UserDivision
User Owner	User
Vehicle	Vehicle
Vehicle Book	VehicleBook
Vehicle Financial Information	EautoFinancialDetail
Vehicle Sales History	EautoSalesHistory
Vehicle Service History	EautoServiceHistory

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 1589)
- Enabling the Modification Tracking Feature (on page 1589)
- About Modification Tracking Events (on page 1602)
- Viewing the Modification Tracking List Page (on page 1604)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 1601)
- Examples of Modification Tracking Event Records (on page 1605)
- Creating Modification Records Manually (on page 1608)

Modification Tracking Information for Changes to Lists of Values in Picklists

This topic describes how you can use the modification tracking feature to track changes to the list of values in picklists. To track changes to picklists, you enable Picklist for the modification tracking feature in addition to the record type that contains the picklist. Picklist is available as an object name in the Modification Tracking List page. Oracle CRM On Demand logs the name of a record type on the Modification Tracking List page for a create, read, update, or delete operation on the picklist for the record type, if the modification tracking feature is enabled for the Picklist object. The following table describes the columns in the Modification Tracking List page when you enable the modification tracking feature for the Picklist object.

Column Heading	Description
Object Name	Picklist.

Column Heading	Description
Object Id	The row identifier for the object that Oracle CRM On Demand assigns, for example, 1QA2-NX0XH. This identifier is unique to the list of values associated with a picklist. Certain fields use the same list of values across multiple objects. If a user edits any value in the list of values, then Oracle CRM On Demand logs modification tracking entries for all the fields. In this case, the object identifier is the same for all such modification tracking entries.
Record Type	The modification tracking name of the record type whose picklist is edited. It is the name of the record type as it appears in the Modification Tracking Page when the record type is tracked.
Field Name	The Web services version 2.0 tag of the picklist field that is edited.

Whenever you edit a picklist field, an entry appears in the Modification Tracking List page, but only if you have enabled the record type whose picklist field you are editing for the modification tracking feature. A single edit to a picklist field on a particular record type can cause multiple entries to be recorded in the Modification Tracking List page because Oracle CRM On Demand maps the picklist fields to the list of value types that are shared among multiple picklist fields across record types. The number of entries is equal to the number of public fields that are mapped to the list of value types of the picklist fields that you edit.

For example, assume that you have a picklist called Picklist Role, with a list of values type set to PARTY_REL_TYPE, and this picklist is also used by the following record types: Account Partner, Account Competitor, Opportunity Competitor, Opportunity Partner. Assume that the picklist is also used by two fields in these record types: Role and Reverse Role. If you update the list of values for any picklist field in this example, then Oracle CRM On Demand creates separate modification tracking entries for all the picklist fields in the example.

Restrictions for Modification Tracking for a List of Values in Picklists

Oracle CRM On Demand does not create modification tracking events for a list of values in picklists with the following conditions:

- The record type associated with the picklist is not set up for your company.
- The picklist updates belong to record types that are not enabled for the modification tracking feature.
- The updated picklist field is not accessible through Web services.

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 1589)
- Enabling the Modification Tracking Feature (on page 1589)
- Record Types that are Tracked (on page 1590)
- About Modification Tracking Events (on page 1602)
- Viewing the Modification Tracking List Page (on page 1604)
- Examples of Modification Tracking Event Records (on page 1605)
- Creating Modification Records Manually (on page 1608)

About Modification Tracking Events

The following table lists the modification tracking events that are created and displayed in the Modification Tracking List page.

Event Name	Description
Associate	This event indicates the association of two records that have a many-to-many relationship, such as contacts and accounts. For example, an associate event occurs when you add a contact to an account record. Similarly, a Dissociate event occurs when you delete a contact from an account record.
DeleteRecord	This event indicates that a record has been marked for deletion, for example, when you delete a messaging plan record. Use this event to track the deletion of records.
Dissociate	This event indicates the disassociation of two records that have a many-to-many relationship. For example, a dissociate event occurs when you delete a contact from an account record.
MergeRecords	This event indicates that two records are merged, for example, when a duplicate Lead record and its child records are merged with a primary Lead record. In this example, the resulting merged record's object ID is the primary Lead record's row ID and the child record's object ID is the duplicate Lead record row ID. The MergeRecords event is supported for the following record types: Account, Contact, Household, Lead, Partner, Portfolio, and Service Request. **NOTE:** Oracle CRM On Demand does not log separate MergeRecords events for child-level record merges.
PreDeleteRecord	This event indicates that a record is about to be deleted, however, the record might not actually be deleted. **NOTE:** It is recommended that you do not to use this event for tracking deleted records. If you intend to track the deletion of records, then use the DeleteRecord event instead.
RestoreRecord	This event indicates that a record, previously marked for deletion, has been restored, for example, when you restore a messaging plan record that was previously marked for deletion.
WriteRecordNew	This event indicates that a new record has been saved for a record type, for example, when you create a new account record. This event also indicates modifications to picklists.
WriteRecordUpdated	This event indicates that an existing record for a parent record type or a child object has been modified, for example, when you update an existing contact record.

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 1589)
- Enabling the Modification Tracking Feature (on page 1589)
- Record Types that are Tracked (on page 1590)
- Viewing the Modification Tracking List Page (on page 1604)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 1601)
- Examples of Modification Tracking Event Records (on page 1605)

- Creating Modification Records Manually (on page 1608)

Viewing the Modification Tracking List Page

This topic describes how to view modification tracking information.

Before you begin. You must be signed in to Oracle CRM On Demand as administrator, and your role must include the Manage Modification Tracking privilege. If the Manage Modification Tracking privilege is not enabled for your company administrator's role, then contact Oracle CRM On Demand Customer Care.

To view the Modification Tracking List Page

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Modification Tracking.

   The Modification Tracking List page opens showing a list of all modification tracking records. For examples of modification tracking records, see Examples of Modification Tracking Event Records (on page 1605).

   The following table describes the Modification Tracking List page.

Column Heading	Description
Object Name	The name of the object to which the tracking event applies, for example, Contact. The object name is usually a record type name, or it can be Picklist.
Object Id	The row identifier for the object that Oracle CRM On Demand assigns, for example, 1QA2-NX0XH.
Child Object Name	The name of the child object to which the tracking event applies, for example, Contact Address. The child object name appears only if it is applicable to the modification event; that is, the object is modified as a child of another object in its view, for example, modifying an address in a contact view.
Child Object Id	The object identifier for the child object that Oracle CRM On Demand assigns, for example, 1QA2-OBA65.
Event Name	The name of the event, for example, WriteRecordNew, when a new record is created. For information on the event names, see the event name descriptions in About Modification Tracking Events (on page 1602).
Record Type	The record type for which an administrator makes a configuration change that triggers modification tracking. The Record Type field is populated only for a configuration change. An example of modification tracking for a configuration change is when an administrator edits a list of values in a picklist field. In this case, the Record Type field logs the name of the object to which the edited picklist field belongs.
Field Name	The Web service version 2.0 tag for a field when you edit a picklist for that field. For custom picklist fields, the Web service version 2.0 tag is the generic integration tag. This field is populated only for picklist edits.

Column Heading	Description
Modification Number	A counter for the number of times that the record has been modified. When a record is initially created, the modification number is set to zero (0) and incremented for each modification that is made to the record.
Modified: Date	The date (MMDDYYY) and time (HH:MM:AM|PM) when the modification event has taken place.

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 1589)
- Enabling the Modification Tracking Feature (on page 1589)
- Record Types that are Tracked (on page 1590)
- About Modification Tracking Events (on page 1602)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 1601)
- Examples of Modification Tracking Event Records (on page 1605)
- Creating Modification Records Manually (on page 1608)

Examples of Modification Tracking Event Records

This topic provides several examples of modification tracking event records created by Oracle CRM On Demand for certain user actions. After the modification tracking feature is enabled, event records are listed in the Modification Tracking List Page, as shown in the following examples. Depending on the type of user action and the relationship of the record types recorded, several records can be written as a result of one event. For example, if there is a one-to-many parent-child relationship or a many-to-many object-to-object relationship, several records can be written.

Example 1: Modification Tracking Record for Creating a New Account Record

In this example, a user creates a new account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	WriteRecordNew	None	None	0	03/26/2014 09:28 AM

Example 2: Modification Tracking Record for Updating an Existing Account Record

In this example, a user updates an existing account record by modifying a field in the account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	WriteRecordUpdated	None	None	1	03/26/2014 09:52 AM

Example 3: Modification Tracking Record for Deleting an Existing Account Record

In this example, a user deletes an existing account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	PreDeleteRecord	None	None	2	03/26/2014 09:58 AM
Account	1QA2-OD54E	None	None	DeleteRecord	None	None	3	03/26/2014 10:00 AM

Example 4: Modification Tracking Record for Restoring an Account Record Marked for Deletion

In this example, a user restores a record marked for deletion before it is purged from Oracle CRM On Demand. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	RestoreRecord	None	None	3	03/26/2014 10:03 AM

Example 5: Modification Tracking Record for Associating an Account Record with a Contact Record

In this example, in a contact record, a user adds an existing account record to the contact record; that is, the user associates the account record with the contact record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Contact	1QA2-OD635	Account	1QA2-OD54E	Associate	None	None	0	03/26/2014 10:16 AM
Contact	1QA2-OD635	None	None	WriteRecordUpdated	None	None	1	03/26/2014 10:16 AM
Contact	1QA2-OD635	Account Contact	1QA2-OD639	WriteRecordUpdated	None	None	1	03/26/2014 10:16 AM
Account	1QA2-OD54E	Contact	1QA2-OD635	Associate	None	None	0	03/26/2014 10:16 AM
Account	1QA2-OD54E	Contact	1QA2-OD635	WriteRecordUpdated	None	None	4	03/26/2014 10:16 AM
Account	1QA2-OD54E	None	None	WriteRecordUpdated	None	None	4	03/26/2014 10:16 AM

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Contact	1QA2-OD635	Account	1QA2-OD54E	WriteRecordUpdated	None	None	4	03/26/2014 10:16 AM

Example 6: Modification Tracking Record for Disassociating an Account Record From a Contact Record

In this example, a user removes a related account record from a contact; that is, the user disassociates the account record from the contact record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	WriteRecordUpdated	None	None	5	03/26/2014 10:35 AM
Contact	1QA2-OD635	None	None	WriteRecordUpdated	None	None	2	03/26/2014 10:35 AM
Contact	1QA2-OD635	Account	1QA2-OD54E	Dissociate	None	None	1	03/26/2014 10:35 AM
Account	1QA2-OD54E	Contact	1QA2-OD635	Dissociate	None	None	1	03/26/2014 10:35 AM

Example 7: Modification Tracking Record for Adding a Child Record to a Parent Account Record

In this example, in an account record, a user creates a new address record as a related item; that is, the user adds the account address as a child record of the parent account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	Address	1QA2-OD6PM	WriteRecordNew	None	None	0	03/26/2014 11:44 AM
Account	1QA2-OD54E	None	None	WriteRecordUpdated	None	None	6	03/26/2014 11:44 AM

Example 8: Modification Tracking Record for Updating an Existing Child Record

In this example, in an account record, a user updates an existing address record; that is, the user updates the account address as a child record of the parent account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	Address	1QA2-OD6PM	WriteRecordUpdated	None	None	1	03/26/2014 11:51 AM

Example 9: Modification Tracking Record for Updating an Existing Child Record

In this example, in an account record, a user deletes the existing address record; that is, the user deletes the account address as a child record of the parent account record. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Account	1QA2-OD54E	None	None	WriteRecordUpdated	None	None	8	03/26/2014 12:00 PM
Account	1QA2-OD54E	Address	1QA2-OD6PN	None	None	None	1	03/26/2014 12:00 PM

Example 10: Modification Tracking Record for Updating a Picklist Value

In this example, in an account, a user updates a picklist, that is, the user customizes an existing Priority picklist field on an Account record by adding a value called Indeterminate. Oracle CRM On Demand generates an event record similar to the record in the following table.

Object Name	Object Id	Child Object Name	Child Object Id	Event Name	Record Type	Field Name	Modification Number	Modified: Date
Picklist	1QA2-OD54E	None	None	WriteRecordUpdated	Account	Priority	8	03/26/2014 1:00 PM

Related Topics

For related information on the modification tracking feature, see the following topics:

- Modification Tracking (on page 1589)
- Enabling the Modification Tracking Feature (on page 1589)
- Record Types that are Tracked (on page 1590)
- About Modification Tracking Events (on page 1602)
- Viewing the Modification Tracking List Page (on page 1604)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 1601)
- Creating Modification Records Manually (on page 1608)

Creating Modification Records Manually

Although the modification tracking feature enables Oracle CRM On Demand to write and track event records automatically, you can create event records manually. This feature might be useful if you want to record events that are external to Oracle CRM On Demand.

Before you begin. You must be signed in to Oracle CRM On Demand as administrator, and your role must include the Manage Modification Tracking privilege. If the Manage Modification Tracking privilege is not enabled for your company administrator's role, then contact Oracle CRM On Demand Customer Care.

To create modification records manually

1. In the upper-right corner of any page, click the Admin global link.
2. In the Business Process Management section, click Modification Tracking.
3. From the Modification Tracking List page, click New.
4. Complete the fields as described in the following table, and then save the record.

Field	Description
Key Modification Tracking Information	
Object Name	The name of the record type to which the tracking event applies, for example, Contact. The object name is usually a record type name, or it can be Picklist. (Required)
Object Id	The row identifier for the record type, typically assigned by Oracle CRM On Demand, for example, 1QA2-NX0XH. (Required)
Child Object Name	The name of the child record to which the tracking event applies, for example, Contact Address. The child record name appears only if it is applicable; that is, the object is modified as a child of another record in its view, for example, modifying an address in a contact view.
Child Row Id	The row identifier for the child record, which Oracle CRM On Demand assigns, for example, 1QA2-OBA65.
Event Name	The name of the event, for example, WriteRecordNew, when a new record is created. See the table of event name descriptions in About Modification Tracking Events (on page 1602) for more information on the possible event names. (Required)
Modification Number	A counter for the number of times that the record has been modified. When a record is initially created, the modification number is set to 0 (zero) and incremented for each modification that is made to the record. (Required)
Record Type	The record type for which an administrator makes a configuration change that triggers the modification tracking feature. The Record Type field is populated only for a configuration change. An example of modification tracking for a configuration change is when an administrator edits a list of values in a picklist field. In this case, the Record Type field logs the name of the object to which the edited picklist field belongs.
Field Name	The Web service version 2.0 tag for a field when you edit a picklist for that field. For custom picklist fields, the Web service version 2.0 tag is the generic integration tag. This field is populated only for picklist edits.
Modified: Date	The date (MMDDYYY) and time (HH:MM:AM|PM) when the modification event has taken place.

Related Topics

For related information on modification tracking, see the following topics:

- Modification Tracking (on page 1589)
- Enabling the Modification Tracking Feature (on page 1589)
- Record Types that are Tracked (on page 1590)
- About Modification Tracking Events (on page 1602)
- Viewing the Modification Tracking List Page (on page 1604)
- Modification Tracking Information for Changes to Lists of Values in Picklists (on page 1601)
- Examples of Modification Tracking Event Records (on page 1605)

Data Management Tools

From the Data Management Tools section of the Admin Homepage, you can perform the following tasks:

- Import and export your company data. For more information, see Import and Export Tools (on page 1610).
- View batch delete and restore requests. For more information, see Batch Delete and Restore Queue Page (on page 1844) .
- View batch book assignment requests and batch team assignment requests. For more information, see Batch Assign Request Queue Page (on page 1846).
- Create and administer the integration event queues. For more information, see About Integration Events (on page 1848).

Import and Export Tools

Several utilities are available from the Import and Export Tools page, which augment the import and export facilities in Oracle CRM On Demand:

- **Import Assistant.** For more information, see Import Assistant (on page 1827).
- **Oracle Data Loader On Demand.** For more information, see Oracle Data Loader On Demand Client Utility (on page 1838).
- **Oracle Migration Tool On Demand.** For more information, see Oracle Migration Tool On Demand Client Utility (on page 1843).
- **Oracle Web Services.** For more information, see Web Services Integration (on page 1838).

For more information about choosing an appropriate import method, see 1801156.1 (Article ID) on My Oracle Support.

The import process consists of these steps:

- Preparing for Data Importing (on page 1656)
- Importing Your Data (on page 1827)
- Reviewing Import Results (on page 1831)

You can also export data from Oracle CRM On Demand to CSV files. For information about exporting, click a topic:

- Exporting Your Data (on page 1833)
- Reviewing Export Results (on page 1836)

Before you begin:

- To import data, your role must include either the Admin Import privilege or the Marketing Import privilege. The Admin Import privilege lets you import all record types, whereas the Marketing Import privilege lets you import only accounts, contacts, and leads.

- If a user wants to import up to 2000 contacts, you must enable the Personal Import privilege for the user's role. The Personal Import privilege provides greater control over a user's data imports. For more information on roles, see Adding Roles (on page 1396).
- Review this entire section as well as the tutorial lessons on importing records, which provide additional information for performing imports (best practices).

  CAUTION: You cannot undo the importing of records or perform a mass deletion of records. Therefore, practice the importing procedure with a file of 5-10 records to avoid cleaning up data afterwards. If your company is importing a large number of records, attend a training session on data importing or contact Customer Care. For information on those resources, click the Training and Support global link at the top of each page in Oracle CRM On Demand.

- Be aware that you cannot import or export concatenated fields in Oracle CRM On Demand. A concatenated field is a field that can display the values from multiple fields and can also display additional text However, you can import and export the individual fields that make up the concatenated fields.
- To export data, your role must include the Admin Export privilege.

You can import data from comma-separated value (CSV) files to automatically create records in Oracle CRM On Demand. Each CSV file must be less than 20 MB in size. To reduce the file size, either divide the records into several files, or reduce the data by deleting the columns that you do not want to import. You can view a sample CSV file in Oracle Data Loader On Demand Guide.

This table describes what types of records you can create by importing data and how many records you can import each time that you run the import process.

Record Type	Record Limit for Each Import
Account	30000
Account Address	50000
Account Competitor	50000
Account Contact	50000
Account Partner	50000
Account Team	50000
Address	30000
Appointment	30000
Appointment Contact	50000
Appointment User	50000
Asset	80000
Contact (Admin)	30000

Record Type	Record Limit for Each Import
Contact Address	50000
Contact Team	50000
Campaign	50000
Campaign Recipient	50000
Deal Registrations	30000
Lead	30000
Modification Tracking	30000
Note	50000
Order	30000
Order Item	30000
Opportunity	30000
Opportunity Contact Role	50000
Opportunity Product	80000
Opportunity Team	50000
Product	80000
Product Category	30000
Property	30000
Social Profile	30000
Solution	50000
Service Request	30000
Task	30000
Task Contact	50000
Task User	50000

Record Type	Record Limit for Each Import
User	500
Vehicle Contact	50000

Depending on the industry-specific solutions you have implemented, the following records can be made available to import:

Record Type	Record Limit for Each Import
Allocation	30000
Application	30000
Blocked Product	30000
Business Plan	30000
Claim	30000
Contact State License	30000
Coverage	30000
Custom Objects	30000
Damage	30000
Dealer	80000
Deal Registration	30000
Event	30000
Financial Account	30000
Financial Account Holder	30000
Financial Account Holding	30000
Financial Plan	30000
Financial Product	30000
Financial Transaction	30000

Record Type	Record Limit for Each Import
HCP Contact Allocations	30000
Inventory Audit Report	30000
Inventory Period	30000
Involved Party	30000
Insurance Property	30000
MDF Request	30000
Messaging Plan	30000
Messaging Plan Item	30000
Messaging Plan Item Relation	30000
Message Response	30000
Objective	30000
Partner	30000
Partner Program	30000
Plan Account	30000
Plan Contact	30000
Plan Opportunity	30000
Policy	30000
Policy Holder	30000
Portfolio	30000
Price List	30000
Price List Line Item	30000
Sample Disclaimer	30000
Sample Inventory	30000

Record Type	Record Limit for Each Import
Sample Lot	30000
Sample Transaction	30000
Signature	30000
Special Pricing Product	30000
Special Pricing Request	30000
Transaction Item	30000
Vehicle	80000

About Countries and Address Mapping

The following table shows:

- Picklist values for the Country field in Oracle CRM On Demand

  The picklist values for the Country field in Oracle CRM On Demand cannot be edited. To capture all the data when importing your files, make sure your countries match the permissible names exactly, including punctuation and capitalization. Otherwise, the information is not imported.

  NOTE: Because the Country picklist values have a 30-character limit, some names that exceed that limit are truncated in the picklist.

- Mappings for addresses per country

  When importing your data, you must set up columns for each of the address fields that Oracle CRM On Demand uses. The following table shows how you want to map the address fields for each country to the appropriate fields within Oracle CRM On Demand. Mapping correctly ensures that you capture all the data in your files under the correct fields in the application.

NOTE: In addition to sovereign states, the following table includes other entities, such as dependencies, foreign territories, and regions of sovereign states. For example, the Isle of Man is a British crown dependency, and Svalbard is a region in Norway.

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
USA	8	Number/ Street	Address 2	Address 3	City	County	US State	Zip	
Afghanistan	6	Address 1	Address 2		City			Post Code	Province
Aland Islands	5	Number/ Street	Address 2					Post Code	Island

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Albania	6	Address 1	Address 2		City			Post Code	Province
Algeria	5	Number/ Street	Address 2		City			Post Code	
American Samoa	6	Address 1	Address 2		City			Post Code	Province
Andorra	5	Number/ Street	Address 2		City			Post Code	
Angola	4	Street/ Number	Address 2		City				
Anguilla	6	Address 1	Address 2		City			Post Code	Province
Antigua and Barbuda	4				City	PO Box			Island
Argentina	7	Number/ Street	Address 2	Address 3	City			Post Code	Province
Armenia	5	Street/ Number	Address 2		City			Post Code	
Aruba	5	Number/ Street	Address 2	Floor	City				
Ascension Island	6	Address 1	Address 2		City			Post Code	Province
Australia	6	Number/ Street	Address 2	Address 3	City			Post Code	State
Austria	5	Street/ Number	Address 2		City			Post Code	
Azerbaijan	5	Street/ Number	Address 2		City			Post Code	
Bahamas	6	Address 1	Address 2		City			Island Code	Island

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Bahrain	5	Number/ Street	Address 2		City			Post Code	
Bangladesh	5	Street/ Number	Address 2		City			Post Code	
Barbados	6	Address 1	Address 2		City			Post Code	Province
Belarus	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Belgium	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Belize	5	Number/ Street	Address 2	Floor	City				
Benin	4				City	Sorting Code		Boite Postale	
Bermuda	5	Number/ Street	Address 2		City			Post Code	
Bhutan	6	Address 1	Address 2		City			Post Code	Province
Bolivia	4	Street/ Number	Address 2		City				
Bonaire, Sint Eustatius, and Saba	5	Address 1	Address 2		City				Island
Bosnia and Herzegovina	5	Street/ Number	Address 2		City			Post Code	
Botswana	3				City	PO Box			
Bouvet Island	6	Address 1	Address 2		City			Post Code	Province
Brazil	7	Street/ Number	Address 2	Floor	City			Post Code	State

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
British Indian Ocean Territory	6	Address 1	Address 2		City			Post Code	Province
Brunei Darussalam	5	Number/ Street	Address 2		City			Post Code	
Bulgaria	5	Street/ Number	Address 2		City			Post Code	
Burkina Faso	4				City	Sorting Code		Boite Postale	
Burundi	3				City	PO Box			
Cabo Verde	4	Street/ Number	Address 2		City				
Cambodia	6	Address 1	Address 2		City			Post Code	Province
Cameroon	3				City	PO Box			
Canada	6	Number/ Street	Address 2		City			Post Code	Province
Cayman Island	6	Address 1	Address 2		City			Post Code	Province
Central African Republic	3				City	PO Box			
Chad	3				City	PO Box			
Channel Islands	6	Address 1	Address 2		City			Post Code	Province
Chile	7	Street/ Number	Address 2	Floor	City	Commune		Post Code	Province
China	7	Number/ Street	Address 2	District	City			Post Code	Province
Christmas Island	6	Address 1	Address 2		City			Post Code	Province

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Cocos (Keeling) Islands	6	Address 1	Address 2		City			Post Code	Province
Colombia	7	Street/ Number	Address 2	Floor	City	Sorting Code			Province
Congo	3	Street/ Number			City				
Congo, Democratic Republic of	5	Street/ Number			City	Sorting Code		Boite Postale	
Cook Islands	6	Address 1	Address 2		City			Post Code	Province
Costa Rica	7	Street/ Number	Address 2	Floor	City			Post Code	Province
Cote d'Ivoire	5	Street/ Number			City	Sorting Code		Boite Postale	
Croatia	5	Street/ Number	Address 2		City			Post Code	
Cuba	4	Street/ Number			City			Codigo Postal	
Curacao	6	Address 1	Address 2		City			Post Code	Province
Cyprus	5	Number/ Street	Address 2		City			Post Code	
Czech Republic	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Denmark	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Djibouti	3				City	PO Box			
Dominica	6	Address 1	Address 2		City			Post Code	Province

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Dominican Republic	6	Number/ Street	Address 2		City			Post Code	Province
Ecuador	7	Address 1	Address 2	Floor	City			Post Code	Province
Egypt	6	Address 1		District	City			Post Code	Province
El Salvador	5	Street/ Number			City			Post Code	Province
Equatorial Guinea	3				City	PO Box			
Eritrea	3	Street/ Number			City				
Estonia	5	Street/ Number	Address 2		City			Post Code	
Eswatini	4				City	PO Box		Post Code	
Ethiopia	3				City	PO Box			
Falkland Islands (Malvinas)	3	Street/ Number			City			Post Code	
Faroe Islands	6	Address 1	Address 2		City			Post Code	Province
Fiji	5	Number/ Street	Address 2	Floor	City				
Finland	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
France	6	Number/ Street	Address 2		City	CEDEX Code		Post Code	
French Guiana	5	Number/ Street	Address 2		City			Post Code	

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
French Polynesia	5	Number/ Street	Address 2		City			Post Code	
French Southern Territories	5	Number/ Street	Address 2		City			Post Code	
Gabon	3				City	PO Box			
Gambia	3	Street/ Number			City				
Georgia	5	Number/ Street	Address 2		City			Post Code	
Germany	5	Street/ Number	Address 2		City			Post Code	
Ghana	3				City	PO Box			
Gibraltar	3	Street/ Number			City				
Greece	5	Street/ Number	Address 2		City			Post Code	
Greenland	5	Street/ Number	Address 2		City			Post Code	
Grenada	6	Address 1	Address 2		City			Post Code	Province
Guadeloupe	5	Number/ Street	Address 2		City			Post Code	
Guam	6	Address 1	Address 2		City			Post Code	Province
Guatemala	5	Street/ Number			City			Codigo Postal	Province
Guernsey	6	Number/ Street	Address 2	Address 3				Post Code	Island
Guinea	3				City	PO Box			

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Guinea-Bissau	4	Street/ Number			City			Codigo Postal	
Guyana	6	Address 1	Address 2		City			Post Code	Province
Haiti	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Heard and Mc Donald Islands	6	Address 1	Address 2		City			Post Code	Province
Holy See / Vatican City	6	Address 1	Address 2		City			Post Code	Province
Honduras	7	Street/ Number	Address 2	Floor	City			Post Code	Province
Hong Kong	7	Number/ Street	Address 2	District	City	Address 4			Part of Territory
Hungary	5	Street/ Number	Address 2		City			Post Code	
Iceland	5	Street/ Number	Address 2		City			Post Code	
India	6	Number/ Street	Address 2		City			Post Code	State
Indonesia	5	Street/ Number	Address 2		City			Post Code	
Iran	5	Number/ Street	Address 2		City			Post Code	
Iraq	6	Address 1	Address 2		City			Post Code	Province
Ireland	6	Number/ Street	Address 2	Address 3	City	County		Eircode	
Isle of Man	7	Number/ Street	Address 2	Address 3	City	County		Post Code	

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Israel	5	Number/ Street	Address 2		City			Post Code	
Italy	6	Street/ Number	Address 2		City			Post Code	Province
Jamaica	6	Number/ Street	Address 2		City	Sorting Code			Parish
Japan	6	Number/ Street/ Chome	Ku		ShiGun			Post Code	Prefecture
Jersey	5	Street/ Number	Address 2					Post Code	Parish
Jordan	5	Number/ Street	Address 2		City			Post Code	
Kazakhstan	4	Address 1			City			Post Code	
Kenya	4				City	PO Box		Post Code	
Kiribati	4	Address 1			City				Island
Korea, Democratic People's Rep	5	Number/ Street	Address 2		City			Post Code	
Korea, Republic	6	Address 1	Address 2		City			Post Code	Province
Kosovo	6	Street/ Number	Address 2	District	City			Post Code	
Kuwait	6	Street/ Number	Address 2		City	County		Post Code	
Kyrgyzstan	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Lao People's Democratic Rep.	5	Number/ Street	Address 2		City			Post Code	

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Latvia	5	Street/ Number			City	Sorting Code		Post Code	
Lebanon	6	Address 1	Address 2		City			Post Code	Province
Lesotho	3				City	PO Box			
Liberia	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Libya	5	Number/ Street	Address 2	Floor	City				
Liechtenstein	5	Street/ Number	Address 2		City			Post Code	
Lithuania	4	Street/ Number			City			Codigo Postal	
Luxembourg	5	Number/ Street	Address 2		City			Post Code	
Macao	6	Address 1	Address 2		City			Post Code	Province
Macedonia	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Madagascar	5	Street/ Number	Address 2		City			Post Code	
Malawi	3				City	PO Box			
Malaysia	7	Number/ Street	Address 2	Address 3	City			Post Code	State
Maldives	5	Number/ Street	Address 2		City			Post Code	
Mali	5	Number/ Street	Address 2	Floor	City				
Malta	6	Number/ Street	Address 2		City			Post Code	Island

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Marshall Islands	6	Number/ Street	Address 2		City			Zip	State
Martinique	5	Number/ Street	Address 2		City			Post Code	
Mauritania	3				City	PO Box			
Mauritius	3	Street/ Number			City				
Mayotte	5	Number/ Street	Address 2		City			Post Code	
Mexico	8	Street/ Number	Address 2	Floor	City	Colonia/ Section		Post Code	State
Micronesia	6	Address 1	Address 2		City			Post Code	Province
Moldova, Republic of	5	Street/ Number	Address 2		City			Post Code	
Monaco	5	Number/ Street	Address 2		City			Post Code	
Mongolia	5	Street/ Number	Address 2		City			Post Code	
Montenegro	6	Address 1	Address2		City			Post Code	Province
Montserrat	6	Address 1	Address 2		City			Post Code	Province
Morocco	5	Number/ Street	Address 2		City			Post Code	
Mozambique	4	Street/ Number			City			Codigo Postal	
Myanmar	5	Address 1			City	Township		Post Code	
Namibia	3				City	PO Box			

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Nauru	3			District		PO Box			
Nepal	5	Street/ Number	Address 2		City			Post Code	
Netherlands	5	Street/ Number	Address 2		City			Post Code	
Netherlands Antilles	5	Address 1	Address 2		City				Island
New Caledonia	5	Number/ Street	Address 2		City			Post Code	
New Zealand	6	Number/ Street	Address 2	District	City			Post Code	
Nicaragua	6	Street/ Number	Address 2		City			Post Code	Province
Niger	3				City	PO Box			
Nigeria	6	Address 1	Address 2		City			Post Code	Province
Niue	3				City	PO Box			
Norfolk Island	6	Number/ Street	Address 2		City			Zip	State
Northern Mariana Islands	6	Number/ Street	Address 2		City			Zip	State
Norway	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Oman	4				City	PO Box		Post Code	Region
Pakistan	6	Number/ Street	Address 2	Address 3	City			Post Code	
Palau	6	Number/ Street	Address 2		City			Zip	State

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Palestine, State of	6	Address 1	Address 2		City			Post Code	Province
Panama	5	Address 1			City	Sorting Code			Province
Papua New Guinea	3				City				Province
Paraguay	4	Street/ Number	Address 2		City				
Peru	8	Street/ Number	Address 2		City	Sorting Code			Province
Philippines	7	Street/ Number	Address 2	District	City			Post Code	Province
Pitcairn	2	Street/ Number							
Poland	5	Street/ Number			City			Post Code	
Portugal	7	Street/ Number	Address 2	Floor	City			Post Code	Province
Puerto Rico	5	Address 1			City	URB		Post Code	
Qatar	6		Address2		City	County		Post Code	PO Box
Reunion	5	Number/ Street	Address 2		City			Post Code	
Romania	5	Street/ Number	Address 2		City			Post Code	
Russian Federation	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Rwanda	3				City	PO Box			
Samoa	6	Number/ Street	Address 2		City			Zip	State

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
San Marino	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Sao Tome and Principe	5	Number/ Street	Address 2	Floor	City				
Saudi Arabia	5	Number/ Street	Address 2		City			Post Code	
Senegal	3	Street/ Number			City				
Serbia	6	Address 1	Address 2		City			Post Code	Province
Seychelles	4				City	PO Box			Island
Sierra Leone	5	Number/ Street	Address 2	Floor	City				
Singapore	5	Street/ Number	Address 2		City			Post Code	
Sint Maarten (Dutch)	5	Address 1	Address 2		City				Island
Slovakia	6	Street/ Number	Address 2		City	Sorting Code		Post Code	
Slovenia	5	Street/ Number	Address 2		City			Post Code	
Solomon Islands	5				City	PO Box		Island Code	Island
Somalia	6	Address 1	Address 2		City			Post Code	Province
South Africa	5	Number/ Street	Address 2		City			Post Code	
South Georgia/ South Sandwich	6	Address 1	Address 2		City			Post Code	Province

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
South Sudan	4	Number/ Street			City	PO Box		Post Code	
Spain	7	Street/ Number	Address 2	Floor	City			Post Code	Province
Sri Lanka	5	Number/ Street	Address 2		City			Post Code	
St. Barthelemy	6	Number/ Street	Address 2		City	CEDEX Code		Post Code	
St. Helena	6	Address 1	Address 2		City			Post Code	Province
St. Kitts and Nevis	5	Address 1	Address 2		City				Island
St. Lucia	5	Number/ Street	Address 2	Floor	City				
St. Martin (French)	6	Number/ Street	Address 2		City	CEDEX Code		Post Code	
St. Pierre and Miquelon	5	Number/ Street	Address 2		City			Post Code	
St. Vincent and Grenadines	5	Number/ Street	Address 2	Floor	City				
Sudan	4				City	PO Box		Post Code	
Suriname	3	Street/ Number			City				
Svalbard and Jan Mayen Islands	6	Address 1	Address 2		City			Post Code	Province
Sweden	5	Street/ Number	Address 2		City			Post Code	
Switzerland	5	Street/ Number	Address 2		City			Post Code	

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Syrian Arab Republic	3	Street/ Number			City				
Taiwan (Province of China)	5	Number/ Street	Address 2		City			Post Code	
Tajikistan	5	Street/ Number	Address 2		City			Post Code	
Tanzania, United Republic of	3				City	PO Box			
Thailand	7	Address 1	Address 2	Address 3	City			Post Code	Province
Timor-Leste	5	Street/ Number	Address 2		City			Post Code	
Togo	3				City	PO Box			
Tokelau	6	Address 1	Address 2		City			Post Code	Province
Tonga	4				City	PO Box			Island
Trinidad and Tobago	5	Number/ Street	Address 2	Floor	City				
Tunisia	5	Street/ Number	Address 2		City			Post Code	
Turkey	5	Street/ Number	Address 2		City			Post Code	Region
Turkmenistan	4	Number/ Street			City			Post Code	
Turks and Caicos Islands	6	Address 1	Address 2		City			Post Code	Province
Tuvalu	4				City	PO Box			Island
Uganda	3				City	PO Box			

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Ukraine	5	Address 1	Address 2		City			Post Code	
Union of the Comoros	3				City	PO Box			
United Arab Emirates	6		Address 2		City	PO Box		Post Code	Emirate
United Kingdom	7	Number/ Street	Address 2	Address 3	City	County		Post Code	
US Minor Outlying Islands	6	Address 1	Address 2		City			Post Code	Province
Uruguay	5	Number/ Street	Address 2		City			Post Code	
Uzbekistan	6	Address 1	Address 2		City			Post Code	Oblast
Vanuatu	3				City	PO Box			
Venezuela	7	Street/ Number	Address 2	Floor	City			Post Code	Province
Viet Nam	5	Number/ Street	Address 2		City			Post Code	
Virgin Islands (British)	6	Address 1	Address 2		City			Post Code	Province
Virgin Islands (U.S.)	6	Number/ Street	Address 2		City			Zip	State
Wallis and Futuna Islands	6	Address 1	Address 2		City			Post Code	Province
Western Sahara	5	Number/ Street	Address 2		City			Post Code	
Yemen	3	Street/ Number			City				

Country (Uneditable Values)	No. of Fields	ADDR	ADDR2	ADDR3	CITY	COUNTY	STATE	ZIP	PROVINCE
Zambia	5	Number/ Street	Address 2		City			Post Code	
Zimbabwe	5	Number/ Street	Address 2	Floor	City				

Valid State Abbreviations for USA

This table shows the picklist values for US states.

Abbreviations	Complete Names
AK	Alaska
AL	Alabama
AR	Arkansas
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia
DE	Delaware
FL	Florida
GA	Georgia
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas

Abbreviations	Complete Names
KY	Kentucky
LA	Louisiana
MA	Massachusetts
MD	Maryland
ME	Maine
MI	Michigan
MN	Minnesota
MO	Missouri
MS	Mississippi
MT	Montana
NC	North Carolina
ND	North Dakota
NE	Nebraska
NH	New Hampshire
NJ	New Jersey
NM	New Mexico
NV	Nevada
NY	New York
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
PR	Puerto Rico

Abbreviations	Complete Names
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VT	Vermont
WA	Washington
WI	Wisconsin
WV	West Virginia
WY	Wyoming

Valid Territory Abbreviations for USA

This table shows the picklist values for US territories.

Abbreviations	Complete Names
AS	American Samoa
FM	Federated States of Micronesia
GU	Guam
MH	Marshall Islands
MP	Northern Mariana Islands
PW	Palau
UM	US Minor Outlying Islands
VI	US Virgin Islands

Valid Mailing Codes for USA

This table shows the three, official state-codes for U.S. military mail recipients.

Abbreviations	Description
AE (ZIP codes 09xxx)	Armed Forces Europe. This term includes Canada, Middle East, and Africa.
AK (ZIP codes 962xx - 966xx)	Armed Forces Pacific.
AA (ZIP codes 340xx)	Armed Forces Americas. This term includes Central and South America.

Valid Province/Territory Abbreviations for Canada

This table shows the official abbreviations for Canadian provinces (text fields).

Abbreviations	Complete Names
AB	Alberta
BC	British Columbia
MB	Manitoba
NB	New Brunswick
NL	Newfoundland and Labrador
NS	Nova Scotia
NT	Northwest Territories
NU	Nunavut
ON	Ontario
PE	Prince Edward Island
QC	Quebec
SK	Saskatchewan
YT	Yukon

About Record Duplicates and External IDs

When you import records, you can choose one of the following options to handle duplicate records:

- By not importing the duplicate ones
- By overwriting the existing ones

NOTE: The overwriting option is not available when you import Appointment User, Task User, or Notes. New records are always created for these record types.

- By creating additional records for the duplicates (Contacts, Leads, Appointments and Tasks only)

If you choose to overwrite existing records when you import your data, Oracle CRM On Demand checks whether the record in your import file is a duplicate of an existing record in Oracle CRM On Demand by checking the values in the fields that are used to check for duplicate records. If your record is a duplicate, Oracle CRM On Demand updates the fields on the existing record in Oracle CRM On Demand with the values from the record that you import, with the exception of the fields that are used to check for duplicate records.

On many record types, you can use either the External ID field or a predefined set of fields to check if the record in your import file is a duplicate of an existing record in Oracle CRM On Demand. If you use the External ID as the field to check for duplicate records, then when a duplicate record is found, all of the fields on the record in Oracle CRM On Demand are updated, with the exception of the External ID field. Similarly, if you use the predefined set of fields to check for duplicate records, all fields other than the duplicate-checking fields are updated on the record in Oracle CRM On Demand.

If you use the predefined set of fields to check whether the record in your import file is a duplicate of an existing record, then Oracle CRM On Demand checks the value in all of the predefined fields to determine whether the record is a duplicate. If the values in all of the predefined fields in the CSV file exactly match the values in all of the corresponding fields on an existing record, then the record is a duplicate. For example, assume that you import a contact record, and the values in the First Name, Last Name, Work Phone #, and Email fields match the values in an existing record. The record you are importing is then considered a duplicate. However, if the values in the First Name, Last Name, and Email fields match the values in an existing record, but the Work Phone # field is blank in your CSV file and is not blank in the existing record, then the record in the CSV file is not considered a duplicate.

For example, on the Account record type, you can use the External ID field, or a combination of the Account Name and Location fields to check for duplicate records. If the record in your file is a duplicate record, the existing record in Oracle CRM On Demand is updated with the data from your import file as follows:

- If you used the External ID field to check for duplicates, all fields other than the External ID field are updated on the record in Oracle CRM On Demand.
- If you used the Account Name and Location fields to check for duplicate records, all fields other than the Account Name and Location fields are updated on the record in Oracle CRM On Demand.

To update records

1. Set up your import CSV file with a column for the External IDs, or for all of the duplicate checking fields for the record type.
2. Make sure that the External IDs for the duplicate checking field values are exactly the same as the values for the existing records. If you are using External IDs, each one must be unique in the system for the update to work.
3. Include at least all required fields in your import CSV file.
4. Select the Overwrite Existing Records option in Step 1 of the import assistant.
5. Make sure that you map the External ID field or all of the duplicate checking fields in the Field Mapping step of the import assistant.
6. Complete all of the import assistant steps to import the data.

When you use the import assistant to update records, only fields that you map in the Field Mapping step are overwritten. Therefore, if you have fields that do not need to be updated, and they are not required for duplicate checking, you do not have to map those fields.

If External IDs exist and you have mapped them during the import process, the application uses them to determine if a record is a duplicate. When importing other record types, you can use those External IDs as references so that the associations are carried over to Oracle CRM On Demand.

For example, if you have an account_id column in your account.csv file, you want to map it to the External Unique ID in Oracle CRM On Demand. When importing contacts, if your contacts.csv file contains a contact_id column (the unique ID for the contact) and an account_id column (a reference to the IDs in the account.csv file), you should map the contact_id to External Unique ID and account_id to Account External ID. During the import process, the application checks the account_id field in each contact record to determine the existing account and link the account to the contact.

If no External IDs exist or you do not map External IDs in your file to the External ID fields in the application, the application determines duplicates by comparing certain fields. The following table lists the fields that are used to determine record duplicates.

Records of This Type	Are Duplicates If These Fields Match
Account	■ Account Name and Location OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Account Address	Account, Address, and Address Type
Account Book	Account and Book
Account Contact	■ Account Name and Contact Full Name OR ■ Account External ID and Contact External ID (Created by another software system) OR ■ Account ID and Contact ID (Oracle CRM On Demand Internal ID)
Account Team	Account and User
Accreditation	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Accreditation Request	■ Id OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Address	■ Address Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Allocation	■ Product, Type, Owner, and Start Date OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Application	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Appointment	■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) **NOTE:** Oracle CRM On Demand does not check for duplicate records when appointments are created through the user interface.
Appointment Contact	■ Appointment External ID, Contact (Contact External ID or Contact Full Name)
Appointment User	■ Appointment External ID, User (User Sign In ID or User External ID)
Asset	■ External ID (Created by another software system)
Blocked Product	■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Book	■ Book Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Book User	■ Book ID, Book External ID, or Book Name if you are identifying existing books ■ User Sign In ID, User External ID, or User ID if you are identifying book users within the book
Broker Profile	■ Broker Profile Name OR

Records of This Type	Are Duplicates If These Fields Match
	■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Business Plan	■ Plan Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Campaign	■ Source Code OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Campaign Recipient	Campaign (Campaign External ID or Campaign ID), Contact (Contact Full Name or Contact External ID), Source Code **NOTE:** You must provide either Contact Full Name or Contact External ID, but not both.
Certification	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Certification Request	■ Id OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Claim	■ Claim Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Contact	■ First Name, Last Name, Work Phone #, and Email OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) **NOTE:** Oracle CRM On Demand does not check for duplicate records when contacts are created through the user interface.

Records of This Type	Are Duplicates If These Fields Match
Contact Address	Contact, Address, and Address Type
Contact Book	Contact and Book
Contact State License	- License Number OR - External ID (Created by another software system) OR - Row ID (Oracle CRM On Demand internal ID)
Contact Team	Contact (Contact Name or Contact External ID) and User (User ID)
Course	- Name OR - External ID (Created by another software system) OR - Row ID (Oracle CRM On Demand internal ID)
Course Enrollment	- Id OR - External ID (Created by another software system) OR - Row ID (Oracle CRM On Demand internal ID)
Coverage	- Coverage Name OR - External ID (Created by another software system) OR - Row ID (Oracle CRM On Demand internal ID)
Custom Objects 01, 02, 03	External ID (Created by another software system) **NOTE:** Oracle CRM On Demand does not check for duplicate records when custom object records are created through the user interface.
Custom Objects 04 and higher	- Name OR - External ID (Created by another software system) OR - Row ID (Oracle CRM On Demand internal ID) **NOTE:** Oracle CRM On Demand does not check for duplicate records when custom object records are created through the user interface.

Records of This Type	Are Duplicates If These Fields Match
Damage	■ Damage Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Dealer	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Deal Registration	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Event	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Exam	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Exam Registration	■ Id OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Account	■ Financial Account OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Account Holding	■ Financial Account Holdings Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Financial Account Holder	■ Financial Account Holder Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Plan	■ Financial Plan Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Product	■ Financial Product Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Financial Transaction	■ Transaction ID OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
HCP Contact Allocation	■ Contact ID, Product ID, Allocation Type, and Start Date OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Insurance Property	■ Type OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Inventory Audit Report	■ Reported Date OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Inventory Period	■ Start Date OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Invitee	■ Event and Contact Name (Contact Full Name or Contact Full Name and Contact ID) OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Involved Party	■ Involved Party Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Lead	■ First Name, Last Name, Company, Primary Phone #, and Email OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) **NOTE:** Oracle CRM On Demand does not check for duplicate records when leads are created through the user interface.
MDF Request	■ Request Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Messaging Plan	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Messaging Plan Item	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Messaging Plan Item Relations	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Note	■ No duplicate checking (Always creates new records)

Records of This Type	Are Duplicates If These Fields Match
Objective	- Objective Name OR - External ID (Created by another software system) OR - Row ID (Oracle CRM On Demand internal ID)
Opportunity	- Opportunity Name and Account (Account Name or Account External ID) OR - External ID (Created by another software system) OR - Row ID (Oracle CRM On Demand internal ID)
Opportunity Contact Role	- Opportunity Name and Contact Full Name
Opportunity Product Revenue	External ID (Created by another software system) **NOTE:** Oracle CRM On Demand does not check for duplicate records when opportunity product revenue records are created through the user interface.
Order	- Order Number OR - External ID (Created by another software system) OR - Row ID (Oracle CRM On Demand internal ID)
Order Item	- Order Item Number OR - External ID (Created by another software system) OR - Row ID (Oracle CRM On Demand internal ID)
Partner	- Partner Name and Location OR - External ID (Created by another software system) OR - Row ID (Oracle CRM On Demand internal ID)
Partner Program	- Partner Program Name OR - External ID (Created by another software system) OR - Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Plan Account	■ Relationship Code OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Plan Contact	■ Contact Full Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Plan Opportunity	■ Opportunity OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Policy	■ Policy Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Policy Holder	■ Policy Holder Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Portfolio	■ Account Number and Product OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Price List	■ Price List Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Price List Line Item	■ LineItem OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Product	■ Product Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Product Indication	■ Product Indication Name OR ■ Row ID (Oracle CRM On Demand internal ID)
Product Category	■ Category Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Disclaimer	■ Relationship Code OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Inventory	■ Relationship Code OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Lot	■ Lot # OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Request	■ Order Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Sample Request Item	■ Order Item Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)

Records of This Type	Are Duplicates If These Fields Match
Sample Transaction	■ Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Service Request	■ SR Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Social Profile	■ Author and Community OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Solution	■ Title OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Special Pricing Product	■ Item Number OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID) **NOTE:** Oracle CRM On Demand does not check for duplicate records when special pricing product records are created through the user interface.
Special Pricing Request **NOTE:** In the import assistant, this record type is shown as SP Request.	■ Request Name OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Task	■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Task Contact	■ Task External ID, Contact (Contact External ID or Contact Full Name)
Task User	■ Task External ID, User (User Sign In ID or User External ID)

Records of This Type	Are Duplicates If These Fields Match
Transaction Item	■ Sample OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
User	■ User ID OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Vehicle	■ VIN OR ■ External ID (Created by another software system) OR ■ Row ID (Oracle CRM On Demand internal ID)
Vehicle Contact	Vehicle and Contact

CAUTION: When updating files, it is recommended that you map either the External ID or the other set of fields for determining duplicates; if you map both of them, you risk overwriting fields used for duplicate checking that you might not want to overwrite. For example, if you map the External ID, Account Name, and Location when updating account records, and a duplicate is found based on the External ID, the Account Name and Location overwrite the existing values in the database. If no duplicates are found based on the External ID, the system checks for duplicates based on Account Name and Location, and if found, overwrites the External ID in the database.

Account Import and External ID Summary

When importing accounts, you specify how you want the application to handle duplicate records:

- Don't Import Duplicate Records

  If duplicates are found, the duplicate record is not imported.
- Overwrite Existing Records

  If duplicates are found, the existing record is updated. If more than one duplicate is found, then no records are inserted or updated.

After selecting the behavior, you have the option of mapping fields, including these two external IDs available with account imports:

- **External Unique ID.** Refers to the external ID of the current record to be imported. The External Unique ID is directly involved in duplicate checking, as described in this section.
- **Parent Account External ID.** References the external ID of the parent record for the current record.

The behavior surrounding each of these external IDs is independent of each other.

Scenarios for External Unique IDs

Scenario A - External Unique ID is not mapped

Duplicate checking is based on Account Name and Location. If a duplicate is found, the behavior is determined by the selected duplicate checking option.

Scenario B - External Unique ID is mapped

Import first tries to find a duplicate record using the External Unique ID.

- Scenario B1 - Single Duplicate External ID Found

  Account Name and Location are checked for duplicates outside of the currently matched record, and if a duplicate is found, no records are updated or inserted.

  If the duplicate checking option is set to Overwrite Existing Records, then the record is updated (including Account Name and Location).

  If the duplicate checking option is set to Don't Import Duplicate Records, then no records are updated or inserted.

- Scenario B2 - Multiple Duplicate External IDs Found

  No Records are inserted or updated.

- Scenario B3 - No Duplicate External ID Found

  Import now checks duplicates based on the Account Name and Location.

  - Scenario B3a - No Duplicate Account Name and Location Found.
    Record is inserted.
  - Scenario B3b - Single Duplicate Account Name and Location Found
    If the duplicate checking option is set to Overwrite Existing Records, the record is updated, *including the External Unique ID*. If the duplicate checking option is set to Don't Import Duplicate Records, no records are updated.
  - Scenario B3c - Multiple Duplicate Account Name and Locations Found
    No records are inserted or updated.

Scenario C - External Unique ID is not Mapped

The Account Name and Location are used to perform duplicate checking.

- Scenario C1 - Single Duplicate Account Name and Location found

  If Duplicate Checking option is set to Overwrite Existing Records, then the record is updated.

  If Duplicate Checking option is set to Don't Import Duplicate Records, then no records are updated or inserted.

- Scenario C2 - Multiple Duplicate Account Name and Location found.

  No records are updated or inserted.

- Scenario C3 - No Duplicate Account Name and Location found

  Record is inserted.

Scenarios for Parent Account External IDs

The Parent Account External ID is only used to set the associated Parent Account Record. It has no impact on duplicate checking or updates.

Scenario A - Parent Account External ID is Mapped

Import uses the Parent Account External ID *only* to determine the Parent Account.

- Scenario A1- Multiple records match Parent Account External ID

  Parent Account is not set.

- Scenario A2 - Single Record matches Parent Account External ID

  Parent Account is set.

- Scenario A3 - No records match the Parent Account External ID

  Parent Account is not set.

Scenario B - Parent Account External ID is not Mapped

Import uses the Parent Account Name and Parent Account Location to determine the Parent Account.

- Scenario B1 - Multiple records match Parent Account Name and Parent Location.
  Parent Account is not set.
- Scenario B2 - Single Record matches Parent Account Name and Parent Location
  Parent Account is set.
- Scenario B3 - No records match the Parent Account Name and Parent Location
  Parent Account is not set.

Linking Records During Import

When you import records, you may want to link them to existing records in the database. For example, you might link a contact record (John Smith) to an account record (Smith Auto Repair).

A record must already exist in the database before you can link another record to it during import. Therefore, when you have more than one type of record to import, it is best to import them in the order in which they appear on the Import and Export Tools page. For example, import account records before you import contact records.

You can link records during import in one of two ways:

- by indicating the name of the linked record or
- by indicating its external ID code.

In either case, you must make sure that your import CSV file includes a column containing the data.

Using the Name to Link Records

To link records by indicating the name, include a column in your import file for the name of the linked record. For example, to import contact records that are linked to accounts:

- add an Account Name column to your import file
- fill in the name of the appropriate account for each contact record
- use the Import Assistant to map the Account Name column to the Account field in the contact record.

NOTE: If a contact record is imported with an associated account that does not yet exist in the database, one can be created during import. The system-created account record will use the contact's address for the account billing and shipping addresses. To enable this feature, select the Create Associated Record option in Step 1 of the Import Assistant.

Using the External ID to Link Records

You can import a unique identifier code into the External ID field for each record in the application. Then, you can use the External ID field to create links between records in subsequent imports.

For example, an exported CSV file of contact records identifies an associated account for each contact. Each account is represented by a numeric code, rather than by a name, in a column called Account Code. When importing these records, first import the account records, mapping the Account Code column in the CSV file to the External ID field in the application. Next, import the contact records, mapping the Account Code column in the CSV file to the Account External ID field in the Oracle CRM On Demand contact record to create a link between the contact and account records.

Data Checking Guidelines

Check the data in your CSV file before importing it into Oracle CRM On Demand:

1. Check the guidelines for the field type of the data. See Field Type Guidelines for Importing Data (on page 1651).
2. Check the specific information pertaining to each record type you want to import. .

The drop-down list in the Import and Export Tools page shows the recommended sequence for importing records. The record types in the list depend on the industry-specific solutions you have implemented, however, you must import the record types in the sequence shown in the list.

NOTE: The data checking guidelines use examples relevant to the installations of Oracle CRM On Demand in the U.S and Canada. Other country-specific installations might change the default lists of valid values, so that they differ from the information shown in this topic. For example, the list of valid state or province values will probably be different for installations outside the U.S and Canada. Also, valid values might be different, depending on the languages that are supported.

Oracle CRM On Demand determines the field order in the export CSV file, and can change at any time. Therefore, do not rely on the fields in the export CSV file to be in a specific order. Renaming the iTAG or field name values has no impact on the order of the fields in the export file. If you want more control of field order, consider using Oracle Web services.

Field Type Guidelines for Importing Data

Make sure the data you want to import meets the specifications for its field type. The field types described in this topic are:

- Text
- Picklist
- Number
- Integer
- Currency
- Percent
- Check box
- Email
- Phone
- Date/Time
- Date

Text

Each text field in Oracle CRM On Demand has a maximum length. Excess characters are not imported. The Import Results email message warns you when this situation occurs.

TIP: Compare the length of the data you want to import against the allowed length. (Open the file in a spreadsheet application and use one of the spreadsheet functions to determine the longest value in a column.) When the data exceeds the limit, consider importing it into a custom field, splitting the data into two separate fields, or abbreviating some data so that it fits within the target length.

Picklist

Single-value picklist fields allow a user to select a single value from a list of values for the field. Multi-select picklist fields allow a user to select one or more values from a list of values for the field. When you import multiple values to a multi-select picklist field, you must separate the values with a semicolon.

If your user language is the same as the company language, then during the import process, you can choose either to add new picklist values from your CSV file to the application or not to add them. The option that you choose applies to both single-value picklist fields and multi-select picklist fields.

NOTE: The option that allows you to import new picklist values is not available when you import notes, and it is not available if your user language is different from the company's default language.

If you choose not to add them, only picklist values that exactly match the ones in the application are imported. (Values are case-sensitive.) The Import Results email message warns you when this situation occurs.

The company administrator has the ability to change the picklist values for fields except for a few specific fields (for the exceptions, see the guidelines for the record type you want to import).

NOTE: If you select the option to add new picklist values when importing data, those new picklist values may not show up in the reports for 24 hours. Therefore, you may not be able to use the new picklist values as filters during that time period.

If a single-value picklist field on a record contains a value that has been disabled, then the value is not removed from the field when you update the record through the Import Assistant unless you specify a new, active value or a null value for the field in the import data. If a multi-select picklist field on a record contains one or more values that have been disabled, then the setting in the Keep Disabled Picklist Value On Update check box on the company profile determines whether the Import Assistant can update the field with a list of values that includes the disabled values that are already selected in the field. For more information about the Keep Disabled Picklist Value On Update check box, see About the Keep Disabled Picklist Value on Update Setting (on page 1256).

To compare the data in your file to the valid values in the application

1. Open your file in a spreadsheet application.

   TIP: If you open the file in Microsoft Excel, you can use the AutoFilter feature to see which values appear for specific columns in your file.

2. Compare the values in your file against the valid values in Oracle CRM On Demand by doing one of the following:
   - If you are an administrator, click the Admin global link in the application and go to the Field Setup page containing the field whose values you want to compare.
   - In Oracle CRM On Demand, click the appropriate tab and select a record. On the Edit page, click the drop-down list for the field you want to check, and compare those values against your data.

TIP: If you decide to restrict the import data to *only* those values that match the existing ones, make sure every imported value matches an existing value. Case matters when determining if there is a match. You can either change the data in the import file to match the valid values or add picklist values to the application (see Changing Picklist Values (on page 1254)).

Number

Import data can be any number between -2,147,483,648 and 2,147,483,647. Commas in your import data are ignored. Digits after a decimal point are rounded to the nearest 100th.

During import, if a value with unexpected characters is found or the value is out of the acceptable range, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Number fields are represented in a common format in the application (for example: 1,234).

Integer

Integers can be any whole numbers ranging in value from - 2147483648 to 2147483647.

Currency

Import data can be any valid number of up to 15 digits. Commas in the import data are ignored. Digits after a decimal point are rounded to the nearest 100th. Import data can be preceded by a $ or other currency character. Negative numbers are valid.

During import, if a value with unexpected characters is found or the value contains too many digits, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Currency fields are represented in a common format in the application (for example: $1,000,000.00).

Percent

Import data can be any valid number of up to 15 digits. Commas in the import data are ignored. Digits after a decimal point are rounded to the nearest 100th. Negative numbers are valid. Import data may be preceded or followed by a % character and any number of spaces between the number and the %. For example, all these valid values appear as 1,234.36% in the application:

1234.36
1,234.36
1234.35678
1234.36%
1,234.36 %

During import, if a value with unexpected characters is found or the value is out of the acceptable range, the data for the field is *not* imported. The Import Results email message warns you when this situation occurs.

Regardless of their imported format, Percent fields are represented in a common format in the application (for example: 1,234.36% (with commas and followed by a % sign).

Check box

A check box has only two settings: checked or unchecked. The following table shows you the values you can use when importing data. These values are not case-sensitive, so the application recognizes “true,” “t,” and so on.

Check box is selected	Check box is blank (deselected)
1	0
Y	N
Yes	No
T	F
True	False
Checked	Unchecked

All other values in the import data result in an unchecked setting for the check box field in the application. The Import Results email message does *not* warn you when this situation occurs.

You must use your translated equivalents of the values in the tables, if you are importing under a different language. However, the application will accept the values in the first two rows of the table, regardless of your language setting: Y, N, 1, 0.

TIP: Check for values that might be expected to result in the checked setting but that are not recognized as such during import. Convert those values to Y before importing.

During the import process, if a check box field for the record type being imported is not mapped to an import file field, its value is set to unchecked for each imported record.

Email

If the import data does not match a certain format, the data for the field is not imported. The following criteria are considered invalid:

- Email data ending or beginning with the at sign (@) or period (.). Both symbols must be surrounded by alpha-numeric characters. For example, these values are not valid:

  a@.
  @a.
  @.a
  a@a.
  a@.a
  @a.a

- Empty string
- String too long
- No characters before the @ at sign, for example: @riqhtequip.com
- No @ at sign, for example:isampleriqhtequip.com
- No period (.), for example: isample@riqhtequipcom
- No domain, for example: isample@
- No domain suffix such as com, for example: isample@riqhtequip
- Multiple at signs (@), for example: isample@@riqhtequip.com
- Consecutive periods (.), for example: isample@riqhtequip..com
- Spaces in the string, for example: isa mple@riqhtequip
- Characters other than the following in the local part of an email address:
  - Uppercase and lowercase letters (case insensitive)
  - The digits 0 through 9
  - The characters ! # $ % & ' * + - / = ? ^ _ ` { | } ~ .
- Any special characters in the domain name of an email address. Special characters include: ! # $ % & ' * + - / = ? ^ _ ` { | } ~ ()

If your administrator selects the Allow Unicode Characters in Email Fields check box on the company profile, then you can use most Unicode (UTF-8) characters, including accented letters, in the address in the Email field on the Contact and Lead record types only. You can use the Unicode (UTF-8) characters in both the local and domain parts of these email addresses, although consecutive periods are still not allowed. In addition, the following characters are not allowed, even if the Allow Unicode Characters in Email Fields check box is selected on the company profile:

, ( ) [ ] : ; " < >

The Import Results email message warns you when data for the field is not imported as a result of incorrect formatting.

Phone

The same format rules for entering phone number data apply to importing phone number data. Data in a recognized phone number format is converted to a consistent format in the application.

The field length rules that apply to text fields also apply to phone number fields. In particular, if the import data exceeds the length of the application field, the excess characters are *not* imported. The Import Results email message warns you when this situation occurs.

Date/Time

Import data can contain several different date/time representations. As part of the importing process, you select the format used in your CSV file.

Regardless of their imported format, Date/Time fields are represented in a common format in the application (for example: 01/19/1964 12:15 PM). The format used to display data is determined by the Locale setting of the user, which is shown on the Personal Detail page.

The date/time values are assumed to be correct for the time zone of the person doing the import, as specified on their Personal Detail page in the application. After the dates/times are imported, however, users viewing the data from a different time zone see the date/time adjusted for their time zone.

TIP: Make sure that the time zone of the person performing the import matches the time zone of the date/times in the import data file. For instance, if the date/times specified in the import data are relevant to Pacific Standard Time, and a user in the Eastern Standard Time zone imports that data, all times will be incorrect by three hours. The solution is for the user to temporarily set the time zone to Pacific Standard Time when doing the import, so the times are imported correctly. Be sure you know what time zone the date/times in your import file are relative to before you start an import. Note that it is very common for date/times in CSV data files to be in Greenwich Mean Time (GMT) format, so be sure to check this item prior to import.

- About Dates in Date/Time Field Type

  When running the Import Assistant, you are required to specify whether import data has dates with month (MM) first, or day (DD) first. If you specify month first, the following formats are supported:

  MM/DD/YY
  MM/DD/YYYY
  MM/DD (year defaults to current year)

  If you specify day first, the following formats are supported:

  DD/MM/YY
  DD/MM/YYYY
  DD/MM (year defaults to current year)

  You may also specify that the import data format is: YYYY-MM-DD.

  For all these formats, MM and DD can contain a leading 0 when the date or month is a single digit, but the 0 is not required.

  NOTE: Dates in the format DD-MON-YY or DD-MON-YYYY are *not* currently supported.

- About Times in Date/Time Field Type

  A time can be specified in the import data. To specify a time with a date, include a space after the date and then the time. If there is no time specified with a date, the time is set to 00:00:00 (midnight). The following time formats are supported:

  HH24:MI:SS
  HH:MI:SS AM
  (where HH24 represents a 24-hour time, and AM represents either AM or PM if HH is a 12-hour value)

  MI or SS can be omitted; and if omitted, they are set to 00 during import. HH, MI and SS can contain a leading 0 when the value is a single digit, but the 0 is not required.

  NOTE: Regardless of the date/time format option you select during import, the import process accepts times in 24-hour format. For example, if you select the default Canada format, which is hh:mm:ss AM/PM, and your file shows a time of 15:00:00, the data is properly imported as 3:00:00 PM.

Date

Date type fields in the application allow entry and display of only a date; they do not allow time to be specified. When importing into one of these fields, valid import data formats are the same as for Date/Time type fields. However, time should *not* be specified in the import data. If a time is specified, it is ignored during the import.

Regardless of their imported format, Date fields are represented in a common format in the application (for example: 12/18/2003).

About Required Fields

If a field has been designated as required (either by default or by the administrator), the entire record is rejected if you don't map the required fields to columns in your CSV file. The Import Results email message warns you when this situation occurs.

TIP: Review the fields for the record type you are importing to determine which ones are required fields. Make sure the import data contains a valid value for all those fields.

About Read-Only Fields

Read-only fields follow this behavior during an import:

- If a read-only field has a picklist, you must match the picklist values exactly to import them.
- If you have read-only access to a field, you are not able to import data into that field.

Preparing for Data Importing

Before you start importing data in Oracle CRM On Demand, you must first determine what import method you want to use. For more information on selecting the appropriate import method, see Import and Export Tools (on page 1610). For example, the Oracle Data Loader On Demand Utility supports only specific record types. For more information, see Oracle Data Loader On Demand Guide. It is also recommended that you read the following topic before you perform an import: .

You might need to edit data in your CSV file or customize Oracle CRM On Demand to make sure all your file data is imported. To determine if that is necessary, do the following before you begin importing:

- Determine the record types you want to import.

  You might want to import different record types, such as leads, accounts, contacts, and notes. You must import one record type at a time, and you should follow the recommended sequence for importing.

  For example, if you have a file that contains a list of your contacts and another file with your accounts, you want to import accounts first and then contacts to maintain the relationships set up between those record types.

  The sequence order is shown on the user interface itself on the Import and Export Tools page.
- Check the data in your file to make sure it:
  - Has consistent capitalization, abbreviations, and spelling

    Text values are imported exactly as they appear in your CSV file. Therefore, any differences in capitalization can result in additional records being created, when that is not desired. For example, all these values for Account Names would result in new records: ABC, abc, A.B.C.

    Additionally, since two account records are recognized as identical if the account name *and* location are identical, addresses must be spelled, capitalized, and abbreviated identically to prevent additional records from being created. For example all these records would **not** be considered identical:

    ABC, 111 10th Avenue

    ABC, 111 10th Ave.

    ABC, 111 10th Ave

    ABC, 111 Tenth Avenue
  - Does not exceed the maximum length allowed
  - Conforms to the formatting requirements for that field

  For more information, see Data Checking Guidelines (on page 1650).
- Check the application for required fields for the record type you want to import.

  You must map data in your CSV file to all required fields. If you don't, the record is rejected. To determine which fields are required, see the Edit page for the record type you want to import. Required fields are shown in red text. Also, your administrator can configure a field so that it is conditionally required, that is, the field is not required by default, but becomes required if the data in other fields on the record meets certain criteria. If a field becomes required as a result of the condition defined for the field being true, and if your import file does not include a value for the conditionally required field, then the record is rejected.
- Add fields to the application if you want to import data that doesn't map to the default fields in the application.

  During the import process, you must match every field in your file to an existing field in the application to capture that data. If your role includes the Customize Application privilege, you can create new (custom) fields in Oracle CRM On Demand to map to the existing fields. For instructions, see Creating and Editing Fields (on page 1219).

- Set up picklist values, if necessary.

  During the import process, you can specify how you want the application to handle picklist values in your CSV file that don't match existing picklist values in the application:

  - Add them as new ones to the application

    NOTE: To see the picklist value changes in the application, you might need to sign out and in again.

  - Don't add them (capture only the values that match and leave the others blank)

  If you want to use the picklist values that exist in the application and import only the data that matches them, verify that the picklist values match exactly, including their spelling and capitalization (values are case-sensitive).

  Some picklist values cannot be changed, and a few don't follow this behavior. See Data Checking Guidelines (on page 1650) and review the guidelines for the record type you want to import.

- Select the correct time format.

  If you select the time format HH:MM:SS AM, for best results indicate whether your data is AM or PM in your CSV file. If you select AM/PM time formats, but the data does not contain AM or PM, then the fields are processed as follows:

  - If the HH field is greater than or equal to 8 and less than or equal to 12, these fields are considered as AM.
  - If the HH field is less than 8 and greater than 12, these fields are considered as PM. For example, 7:00:00 is processed as 7:00 PM, whereas 9:00:00 is processed as 9:00 AM.

Related Topics

See the following topics for related information:

- Changing Picklist Values (on page 1254)
- Import and Export Tools (on page 1610)

For more information about preparing data importing, see 1800338.1 (Article ID) on My Oracle Support.

Account Address Fields: Import Preparation

The following table contains specific information about setting up your records before importing account addresses into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. You can import Account Address fields in Oracle CRM On Demand only if shared addresses are set up for your company. For more information on shared addresses, see Managing Addresses (on page 343).

Default Account Address Field Name	Data Type	Maximum Length	Comments
Row ID	ID	15	None.
Account ID	ID	15	None.
Account External ID	Text	30	None.

Default Account Address Field Name	Data Type	Maximum Length	Comments
Address ID	ID	15	None.
Address External ID	Text	30	None.
Address Type	Picklist	30	The following default address types are available: Residential, Office, Vacation Home, Other, Vanity, Private, Postal, Hospital, and Clinic.
Billing	Checkbox	1	If the Billing field has a value of Y, then the address is a billing address. The values for this field are Y and N.
Shipping	Checkbox	1	If the Shipping field has a value of Y, then the address is a shipping address. The values for this field are Y and N.

Account Book Fields: Import Preparation

The following table contains information about setting up your CSV file before importing account books into Oracle CRM On Demand.

NOTE: To import account book or contact book records, your role must include the Manage Future Books privilege.

The information in this topic supplements the guidelines in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. For more information on time-based book assignments, see About Time-Based Book Assignments (on page 1437).

Default Book Accounts Field Name	Data Type	Maximum Length	Comments
Book	String	150	None
Book Id	String	15	None
Book External ID	String	30	None
Account: Id	String	15	Account identifier.
Account	String	100	None
Account Location	String	50	None

Default Book Accounts Field Name	Data Type	Maximum Length	Comments
Account External ID	String	30	None
Start Date	Date	None	The date on which the record activation must take place.
End Date	Date	None	The date on which the record activation must end.
Future Primary Flag	String	1	If the future primary flag has a value of Y, then the book for the current record is set to primary for the data object when the book is activated. This is based on the Start Date field. The values for this field are: Y and N.

Account Contact Fields: Import Preparation

The following table contains specific information about setting up your records before importing account contacts into Oracle CRM On Demand. It supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Contacts Field Name	Data Type	Maximum Length	Comments
Account ID	ID	15	None
Account External ID	Text	30	None
Account Name	Varchar	100	None
Contact External ID	Text	30	None
Contact Name	Text	255	The contact's full name
Contact ID	ID	15	None

Default Account Contacts Field Name	Data Type	Maximum Length	Comments
Currency	Varchar	20	None
Exchange Date	Date	Not applicable	None

Account Competitor Fields: Import Preparation

The following table contains specific information about setting up your records before importing account competitors into Oracle CRM On Demand. It supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Competitor Field Name	Data Type	Maximum Length	Comments
Account ID	ID	15	None
Competitor ID	ID	15	None
This Account	Text	100	Indicates the parent account name
Account Competitor	Text	100	Indicates the name of the competitor
Account External Unique ID	Text	30	None
Competitor External ID	Text	30	None
ID	ID	15	Indicates the row ID of the account competitor
Role	Picklist	30	None
Reverse Role	Picklist	30	None
Start Date	Date	None	None
End Date	Date	None	None
Status	Text	30	None

Default Account Competitor Field Name	Data Type	Maximum Length	Comments
Strengths	Note	1999	None
Weakness	Note	1999	None
Contact ID	ID	15	None
Primary Contact	Text	100	None
Comments	Note	1999	None

Account Event Fields: Import Preparation

The following table contains specific information about setting up your records before importing account events into Oracle CRM On Demand. It supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Event Field Name	Data Type	Maximum Length	Comments
Account	Text	50	None
Account ID	ID	15	None
Account External Unique ID	ID	15	External unique ID of the account.
Event	Text	50	Name of the event.
Event ID	ID	15	None
Event External System ID	ID	15	External system ID of event.
Row ID	ID	15	None

Account Fields: Import Preparation

The following table contains specific information about setting up your records before importing accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Field Name	Data Type	Maximum Length	Comments
Account Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Account Name	Text	100	This field is required by default. Therefore, make sure all records have values in this field before import.
Account Type	Picklist	30	Default valid values: Competitor, Customer, Partner, and Prospect
Annual Revenues	Currency	15	None
Billing Address	Picklist	100	The value in this field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Billing Address 2, 3	Text	100 each	This field is not available if shared addresses are set up for your company.
Billing Address1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Billing City	Text	50	This field is not available if shared addresses are set up for your company.
Billing Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.

Default Account Field Name	Data Type	Maximum Length	Comments
Billing PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Billing Province	Text	50	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Billing US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import. This field is not available if shared addresses are set up for your company.
Billing Zip/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Bill To Address External ID	Text	30	If shared addresses are enabled for your company, the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing Address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated Address record.
Call Frequency	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters and the remaining characters are added to linked Notes, each with a maximum limit of 16,350 characters.

Default Account Field Name	Data Type	Maximum Length	Comments
Division	Text	50	None
External Unique ID	Text	30	None
Furigana Name	Text	100	The Furigana equivalent of the Kanji (for Japanese only).
HIN	Text		Health Industry Number. Specific to Oracle CRM On Demand Life Sciences Edition.
Industry	Picklist	50	The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import. Alternatively, your company's Oracle CRM On Demand administrator can create a custom Account field that contains the valid values that you expect in your import data. This would allow you to import your data into that custom field instead of this field. Default valid values: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications
Influence Type	Text	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Integration ID	Text	30	None
Last Call Date	UTC Date Time	7	Specific to Oracle CRM On Demand Life Sciences Edition.
Location	Text	50	In most cases, this field is used to determine record duplication. For more information, see About Record Duplicates and External IDs (on page 1635). For example, to distinguish between headquarters and a branch office of Account XYZ, the application checks both the Account Name and the Location to determine if the record is a duplicate.
Main Fax #	Phone	40	None
Main Phone #	Phone	40	None

Default Account Field Name	Data Type	Maximum Length	Comments
Market Potential	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Segment	Text	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this text.
Market Share	Number	22	Specific to Oracle CRM On Demand Life Sciences Edition.
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Number of Employees	Integer	Not applicable	None
Number of Physicians	Number	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Parent Account	Text	100	Must be a valid Account name.
Parent Account External ID	Text	30	None
Parent Account Location	Text	50	None
Partner	Check box	Not applicable	Indication that the account is a partner.
Picklist Value Group	Text	50	None
Priority	Picklist	30	Default valid values: Low, Medium, and High

Default Account Field Name	Data Type	Maximum Length	Comments
Public Company	Check box	Not applicable	This field should be set to the checked state if this is a public (versus privately-owned) company.
Rating 1	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5. For more information, see About Fields Displayed As Images (on page 56).
Rating 2	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Rating 3	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Reassign Account	Check box	Not applicable	Indication that the account should be reassigned. When imported, triggers automatic assignment rules for this account record, if your company administrator or manager has set that feature up.
Reference	Check box	Not applicable	This field should be set to the checked state if this account agreed to be a reference that you can give out to prospects.
Reference as of	Date	Not applicable	None
Region	Picklist	25	Default valid values: East, West, and Central
Route	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit the picklist.
Shipping Address	Picklist	100	This field is only available if shared addresses are set up for your company. This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated Address record.

Default Account Field Name	Data Type	Maximum Length	Comments
Shipping Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Shipping Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Shipping City	Text	50	This field is not available if shared addresses are set up for your company.
Shipping Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Shipping PO Box/ Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Shipping Province	Text	50	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Shipping US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital

Default Account Field Name	Data Type	Maximum Length	Comments
			letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import. This field is not available if shared addresses are set up for your company.
Shipping Zip/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Ship To Address External ID	Text	30	If shared addresses are enabled for your company, the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing Address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated Address record.
Source Campaign	Picklist	30	The campaign that generated the account.
Status	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition. You can edit the picklist.
Stoplight 1	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2. For more information, see About Fields Displayed As Images (on page 56).
Stoplight 2	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Stoplight 3	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Territory	Text	255	None
Web Site	Text	100	No formatting checking (except length checking) is done on the imported data for this field.
YTD Revenue	Number	22	Specific to Oracle CRM On Demand Life Sciences Edition.

Account Partners Fields: Import Preparation

The following table contains specific information about setting up your records before importing account partners into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Partner Field Name	Data Type	Maximum Length	Comments
Account Id	ID	15	None.
Partner Id	ID	15	None.
Parent Account Name	Text	100	None.
Account External Unique Id	Text	30	None.
Partner External Id	Text	30	None.
Id	ID	15	None.
Role	Picklist	30	None.
Reverse Role	Picklist	30	None.
Start Date	Date	None	None.
End Date	Date	None	None.
Status	Text	30	None.
Strengths	Note	1999	None.
Weakness	Note	1999	None.
Contact Id	Id	15	None.
Primary Contact	Text	100	None.
Comments	Note	1999	None.

Account Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing account teams into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Account Team Field Name	Field Type	Maximum Length	Comments
Account Access	Picklist	15	Default valid values: Full, Readonly, Edit, Owner. You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Account Location	Text	50	None
Account Name	Text	100	None
Contact Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access. You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Opportunity Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access. You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Team Role	Picklist	30	Default valid values: Owner, Executive Sponsor, Consultant, Partner, Other
User ID	Text	50	None
Account External ID	Text	30	None
User External ID	Text	30	None

Accreditation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing accreditation data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Accreditation Field Name	Field Type	Maximum Length	Comments
Accreditation Fee	Currency	22	None.

Accreditation ID	Text	50	It is recommended that the internal identifier for the accreditation be unique.
Available From	Date	7	None.
Available To	Date	7	None.
Company	Text	50	None.
Contact	Picklist	15	Use this field if the accreditation contact is already present in Oracle CRM On Demand.
Currency	Picklist	15	None
Description	Text	250	None.
Email	Text	40	The email address for the accreditation contact.
Exchange Date	Date	Not applicable	None
First Name	Text	50	Use this field to enter the accreditation contact's first name only if the contact is not present in Oracle CRM On Demand.
Last Name	Text	50	Use this field to enter the accreditation contact's last name only if the contact is not present in Oracle CRM On Demand.
Name	Text	50	It is recommended that the accreditation name be unique.
Objective	Picklist	50	None.
Owner	Picklist	15	None.
Payment Options	Picklist	30	The default valid values are as follows: Check, Credit Card, Cash, and Earned Funds.
Phone	Phone	50	The phone number for the accreditation contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Renewable	Check box	1	None.

Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Sales, Technical, Service, Installation, Upgrade, Design, and Security.
Validity (Months)	Number	22	None.
Website	Text	100	The URL for a page that contains additional accreditation information.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Accreditation Fields (on page 515)

Accreditation Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing request data for course accreditation into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Accreditation Request Field Name	Field Type	Maximum Length	Comments
Accreditation Date	Date	7	None.
Accreditation Name	Picklist	15	None.
Accreditation Number	Text	50	Accreditation numbers are usually unique.
Accreditation Status	Picklist	30	The default valid values are as follows: Requested, Granted, and Denied.
Description	Text	250	None.
Expiration Date	Date	7	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Partner Name	Picklist	15	None.

Plan	Picklist	15	None.
Renewable	Check box	1	None.
Request Date	Date	7	This field displays the current date during record creation by default, but you can modify it during and after record creation.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Address Fields: Import Preparation

The following table contains information about setting up your records before importing addresses into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Address Field Name	Data Type	Maximum Length	Comments
Address Name	Text	100	This field is required and must be unique.
Country	Text	30	None
Address 1	Text	200	None
Address 2	Text	100	None
Address 3	Text	100	None
State	Text	30	None
City	Text	50	None
Province	Text	50	None
Postal Code	Text	30	None
Description	Text	100	None

Default Address Field Name	Data Type	Maximum Length	Comments
Comments	Text	1999	None
Latitude	Number	22	You can use this field value for mobile applications, such as Oracle CRM On Demand Disconnected Mobile Sales and Oracle CRM On Demand Connected Mobile Sales, that support geocoding features.
Longitude	Number	22	You can use this field value for mobile applications, such as Oracle CRM On Demand Disconnected Mobile Sales and Oracle CRM On Demand Connected Mobile Sales, that support geocoding features.

Allocation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing allocations into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Allocation Field Name	Data Type	Maximum Length	Comments
Allocation Type	Text	30	None
Allocation Qty	Number	22	The quantity of the product that is allocated to the sales representative from the administrator.
Distributed Qty	Number	22	The quantity of the product that the sales representative dropped off within the allocation period.
End Date	Date/Time	7	The last date on which the product can be disbursed.
Max Qty	Number	22	The quantity of the product that the sales representative can distribute at a given time to a customer.
Order By	Number	22	The order in which the user can see the products in the list.

Default Allocation Field Name	Data Type	Maximum Length	Comments
Remaining Qty	Number	22	The quantity of the product that remains available for the sales representative to drop off within the allocation period.
Sample	Text	15	The product name associated with the allocation.
Start Date	Date/Time	7	The date on which the distribution starts.
Stop Sampling Flag	Boolean	1	When this field is selected, it indicates that the product can no longer be disbursed.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Application Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing application records into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Application Field Name	Data Type	Maximum Length	Comments
Address Address 1	Varchar	200	The number and street of the company's address from whom the application is made.
Address Address 2	Varchar	100	None
Address Address 3	Varchar	100	None
Address City	Varchar	50	None
Address Country	Varchar	30	None

Default Application Field Name	Data Type	Maximum Length	Comments
Address PO Box/Sorting Code	Varchar	200	None
Address Province	Varchar	50	None
Address US State	Varchar	10	None
Address Zip/Post Code	Varchar	30	None
Annual Revenue	Number	22	The total annual revenue for the company.
Approval Status	Varchar	30	The current approval status for the application.
Approved Date	Date	7	The date and time that the application was approved.
Campaign	Varchar	15	This is the name of the campaign that attracted the partner to make the partner application.
Cellular Phone #	Varchar	40	The submitter's cellular phone number.
Currency	Picklist	15	None
Current Approver	Varchar	15	The name of the current approver.
Email Address	Varchar	100	The submitter's email address.
Exchange Date	Date	Not applicable	None
Existing Partnerships	Varchar		The list of existing partnerships.
Expected Partnership Benefits	Varchar	500	The list of expected benefits from this partnership.
First Name	Varchar	50	The submitter's first name.
Industry	Varchar	50	The industry in which the company competes.
Job Title	Varchar	75	The submitter's job title.
Last Name	Varchar	50	The submitter's last name.

Default Application Field Name	Data Type	Maximum Length	Comments
Location	Varchar	50	The location of the company.
Main Fax #	Varchar	40	The primary fax number for the company.
Main Phone #	Varchar	40	The primary phone number used to reach the company.
Name	Varchar	50	The name of the company.
Number of Employees	Number	22	The total number of employees in the company.
Owner	Varchar	15	The owner of the record.
Partner	Varchar	15	The partner who is associated with this application.
Partner Program	Varchar	15	The name of the partner program associated with the application.
Partner Type	Varchar	30	The type of partner for which the application is being submitted.
Program Level	Varchar	30	The level of the partner program associated with the application.
Reject Reason	Varchar	30	The reason why the application was rejected.
Source	Varchar	30	The source from which this application comes, for example, Web site, direct mail, email, and so on.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	Date	7	The submission date and time of the application.
Web Site	Varchar	100	The URL address for the company.
Work Fax #	Varchar	40	The submitter's work fax number.
Work Phone #	Varchar	40	The submitter's work phone number.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Appointment Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a contact and an appointment into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Appointment Contact Field Name	Data Type	Maximum Length	Comments
Contact Full Name	Text	255	None
Contact External ID	Text	30	None
Appointment External ID	Text	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Appointment User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a user and an appointment into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Appointment User Field Name	Data Type	Maximum Length	Comments
User ID	Text	30	None
Appointment External ID	Text	30	None
User External ID	Text	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Appointment, Task, and Call Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing appointments and tasks into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Select the correct time format. If you select the time format HH:MM:SS AM, for best results indicate whether your data is AM or PM in your CSV file. If you select AM/PM time formats, but the data does not contain AM or PM, then the fields are processed as follows: if the HH field is greater than or equal to 8 and less than or equal to 12, these fields are considered as AM. If the HH field is less than 8 and greater than 12, these fields are considered as PM. For example, 7:00:00 is processed as 7:00 PM, whereas 9:00:00 is processed as 9:00 AM.

Default Appointment, Task, and Call Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None
Account External ID	Text	30	None
Account Location	Text	50	None
Activity	Text	100	None
Activity Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Appointment Reminder	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Campaign	Text	50	None
Campaign External ID	Text	30	None
Comments	Note	250	None
Contact	Text	255	None
Contact External ID	Text	30	None

Default Appointment, Task, and Call Field Name	Data Type	Maximum Length	Comments
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Due Date	Date	32	None. This field is available for tasks. It is a required field by default.
End Time	Date/Time	32	None. This field is available for appointments. It is a required field by default.
External Unique ID	Text	30	None
Event	Picklist	50	Specific to Oracle CRM On Demand Life Sciences Edition.
Fund Request	Picklist	30	Specific to Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition. Read-only.
Integration ID	Text	30	None
Lead	Text	255	None
Lead External ID	Text	30	None
Location	Text	100	For appointments only.
Opportunity	Text	100	None
Opportunity External ID	Text	30	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.

Default Appointment, Task, and Call Field Name	Data Type	Maximum Length	Comments
Owner External ID	Text	30	None
Priority	Picklist	30	This field is required by default. Default valid values: 1-High, 2-Medium, 3-Low
Private	Check box	Not applicable	None
Service Request	Text	64	None
Service Request External ID	Text	30	None
Start Time	Date/Time	32	None. This field is available for appointments. It is a required field by default.
Status	Picklist	30	The default valid values are: Completed, Deferred, In Progress, Waiting For Someone Else, Not Started
Subject	Text	150	Available for tasks and appointments. It is a required field by default.
Task Currency	Text	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Task Reminder	Date/Time	32	None.
Type	Picklist	30	This field is available for tasks and appointments. The default valid values are: Call, Correspondence, Demonstration, Email, Event, Fax, Meeting, Other, Personal, Presentation, To Do

Related Topics

See the following topics for related information:

- Activity Fields (on page 229)
- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Asset Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing assets into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Asset Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None
Account External ID	Text	30	None
Asset Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Contract	Text	30	None
Customer Contact	Text	255	None
Description	Text	250	None
Expiration Date	Date	7	None
External Unique ID	Text	30	None
Install Date	Date	7	This field is automatically populated with the current date when you import assets into Oracle CRM On Demand.
Integration ID	Text	30	None
Notify Date	Date	7	Specific to Oracle CRM On Demand High Tech Edition.
Operating Status	Text	30	None

Default Asset Field Name	Data Type	Maximum Length	Comments
Product External ID	Text	30	None
Product Name	Text	100	Required field by default.
Purchase Date	Date	7	None
Purchase Price	Currency	15	None
Quantity	Number	15	None
Serial #	Text	100	None
Ship Date	Date	7	None
Warranty	Text	30	None

Related Topics

See the following topics for related information:

- Tracking Assets (on page 278)
- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Blocked Product Fields: Import Preparation

The following table contains specific information about setting up your records before importing blocked product records into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Blocked Product Field Name	Data Type	Maximum Length	Comments
Contact	Text	15	None
Currency	Picklist	15	None
Description	Text	250	None
Exchange Date	Date	Not applicable	None
External System Id	Text	50	None

Default Blocked Product Field Name	Data Type	Maximum Length	Comments
Id	Text	15	None
Indexed Checkbox	Boolean	1	None
Indexed Currency	Currency	22	None
Indexed Date	Date/Time	32	None
Indexed Number	Number	22	None
Indexed Picklist 1	Picklist	30	None
Indexed Picklist 2	Picklist	30	None
Indexed Picklist 3	Picklist	30	None
Indexed Picklist 4	Picklist	30	None
Indexed Picklist 5	Picklist	30	None
Owner	Text	15	None
Product	Text	100	None
Contact: External Unique Id	Text	50	None
Owner: External Unique Id	Text	50	None
Product: External Unique Id	Text	50	None

Book User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing book users into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. For more information on using books in Oracle CRM On Demand, see Book Management (on page 1421).

Default Book Users Field Name	Data Type	Maximum Length	Comments
Access Profile	String	100	None
Book User Role	String	30	None
Users	String	50	This field is the value for the user alias.
Book Name	String	150	If you perform a new import, then it is recommended that you only specify a value for the Book Name field, or the Book Id, not both.
Book Id	String	15	If you perform a new import, then it is recommended that you only specify a value for the Book Name field, or the Book Id, not both. If you update an existing record, then the Book Id field is mandatory.
User Identifier	String	15	If you update an existing record, then the User Identifier field is mandatory. If you perform a new import, then it is recommended that you specify values for at least one of the following fields: User Sign In ID or User Identifier, or User External ID.
User External Id	String	30	If you perform a new import, then it is recommended that you specify values for at least one of the following fields: User Sign In ID or User

Default Book Users Field Name	Data Type	Maximum Length	Comments
			Identifier, or User External Id.
User Sign In ID	String	50	If you perform a new import, then it is recommended that you specify values for at least one of the following fields: User Sign In ID or User Identifier, or User External Id.

Book Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing books into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. For more information on using books in Oracle CRM On Demand, see Book Management (on page 1421).

Default Books Field Name	Data Type	Maximum Length	Comments
Book Id	String	15	None
Parent Book	String	150	None
Book Type	String	30	None
Can Contain Data	String	1	None
Book Name	String	150	None
Description	String	255	None
Partner	String	100	If you want to import the Partner field, then it is recommended that you also import the Location field as well.
External Unique ID	String	30	None

Default Books Field Name	Data Type	Maximum Length	Comments
Location	String	50	This field is the partner location.

Broker Profile Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing broker profile data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Broker Profile Field Name	Field Type	Maximum Length	Comments
Broker Profile Name	Text	40	The name of the broker profile.
Broker Profile Year	Picklist	30	The year during which the broker profile is valid.
Company Historic and Future Growth	Text	250	The description of the company history and future growth for the broker.
Company Overview	Text	250	Provides additional information about the broker.
Created	Text	30	Oracle CRM On Demand generates this information: the name of the person who created the broker profile followed by the date.
Currency	Picklist	15	None
Division	Text	50	None
Fax Number	Phone	35	The broker fax number
Exchange Date	Date	Not applicable	None
Modified	Text	30	Oracle CRM On Demand generates this information: the name of the person who last modified the broker profile followed by the date.
Partner	Picklist	30	The broker name.
Phone Number	Phone	35	The broker phone number.

Picklist Value Group	Text	50	None
Primary Address	Text	50	The broker primary address.
Sub Channel	Picklist	30	The broker coverage. The default valid values are as follows: Globals, Locals, Nationals, Regionals, and Wholesalers.
Segmentation	Picklist	30	The broker segmentation. The default valid values are as follows: Commercial, Growth, and Retail.
Territory/Regional Structure	Text	250	The broker territory or regional structure.
Website	Text	100	The URL for a page that contains additional broker profile information.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Broker Profile Fields (on page 713)

Business Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing business plan fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Business Plan Fields Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Currency	Picklist	20	None
Description	Note	250	None
Division	Text	50	None
Exchange Date	Date	7	None
Notes	Text	250	None

Default Business Plan Fields Name	Data Type	Maximum Length	Comments
Opportunities	Text	250	None
Parent Plan Name	Text	15	The reference field for holding the Business Plan Object ID.
Period	Text	15	The reference field for holding the Period Object ID.
Picklist Value Group	Text	50	None
Plan Revenue	Currency	22	None
Product Name	Text	15	The reference field for holding the Product Object ID.
Status	Picklist	30	None
Strengths	Text	250	None
Threats	Text	250	None
Type	Picklist	30	None
Weaknesses	Text	250	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Campaign Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing campaigns into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Campaign Field Name	Data Type	Maximum Length	Comments
Actual Cost	Currency	15	None

Default Campaign Field Name	Data Type	Maximum Length	Comments
Audience	Text	2000	None
Budgeted Cost	Currency	15	None
Campaign Currency	Picklist	15	None
Campaign Email	Text	50	None
Campaign Name	Text	50	Required field by default.
Campaign Phone #	Phone	40	None
Campaign Type	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, Other
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None
End Date	Date	7	None
External Unique ID	Text	30	None
Leads Targeted (#)	Integer	Not applicable	None
Objective	Text	2000	None
Offer	Text	255	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On

Default Campaign Field Name	Data Type	Maximum Length	Comments
			User ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Picklist Value Group	Text	50	None
Revenue Target	Currency	15	None
Source Code	Text	30	Required field by default.
Start Date	Date	7	None
Status	Picklist	30	Default valid values: Planned, Active, Completed

Related Topics

See the following topics for related information:

- Campaign Fields: Import Preparation (on page 1689)
- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Campaign Recipient Fields: Import Preparation

The following table contains specific information about setting up your CSV file before campaign recipients into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. To import Campaign Recipient fields, the minimum information required is the Contact External ID and Campaign Name.

Default Product Category Field Name	Data Type	Maximum Length
Delivery Status	Text	30
Response Status	Text	30
Campaign Name	Text	100
Contact Full Name	Text	255
Campaign External ID	Text	30

Default Product Category Field Name	Data Type	Maximum Length
Contact External ID	Text	30
Description	Text	250

Certification Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing certification data into Oracle CRM On Demand. This information supplements the guidelines given in the topic, Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Certification Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.
Available To	Date	7	None.
Certification Fee	Currency	22	None.
Certification ID	Text	50	It is recommended that the internal identifier for the certification be unique.
Company	Text	50	None.
Contact	Picklist	15	Use this field if the certification contact is already present in Oracle CRM On Demand.
Description	Text	250	None.
Email	Text	50	The email address for the certification contact.
First Name	Text	50	Use this field to enter the certification contact's first name only if the contact is not present in Oracle CRM On Demand.
Last Name	Text	50	Use this field to enter the certification contact's last name only if the contact is not present in Oracle CRM On Demand.
Name	Text	50	The name of the certification.
Objective	Picklist	15	None.

Owner	Picklist	30	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the certification contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Renewable	Check box	1	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Pre-Sales, Post-Sales, Technical, Service, Installation, Upgrade, Design, and Security.
Validity (Months)	Number	22	None.
Website	Text	100	The URL to a page that contains additional certification information.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Certification Fields (on page 507)

Certification Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing certification request data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Certification Request Field Name	Field Type	Maximum Length	Comments
Candidate Name	Picklist	15	None.

Candidate Date	Date	7	None.
Certification Name	Picklist	15	None.
Certification Number	Text	50	Certification numbers are usually unique.
Certification Status	Picklist	30	The default valid values are as follows: Requested, Granted, and Denied.
Currency	Picklist	15	None.
Description	Text	250	None.
Exchange Date	Date	Not applicable	None.
Expiration Date	Date	7	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Plan	Picklist	15	None.
Request Date	Date	7	This field displays the current date during record creation by default, but you can modify it during and after record creation.
Renewable	Check box	1	None.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Certification Fields (on page 507)

Claim Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing claims data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for claims data only.

Claim Field Name	Data Type	Maximum Length	Comments
Ability to Work	Picklist	30	None
Address	Text	200	None
Address Line 1	Text	100	None
Address Line 2	Text	100	None
Amount of Liability	Currency	22	None
Amount of Loss	Currency	22	None
At Fault	Picklist	30	None
Business Account	Text	15	The held away institution (business account) linked to this record.
Business Account: External System ID	Text	30	None
Category of Loss	Picklist	30	None
City	Text	50	None
Claim Number	Text	50	The predefined field for the matching record.
Class of Employee	Picklist	30	None
Closed Date	Date	Not applicable	None
Comments	Text	250	None
Company: External System ID	Text	30	Also known as the external unique ID.
Conditions	Text	50	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Country	Text	30	None
County	Text	50	None

Claim Field Name	Data Type	Maximum Length	Comments
Currency Code	Picklist	20	None
Date of Employer Aware of Claim	Date	Not applicable	None
Date of Employer Aware of Injury	Date	Not applicable	None
Division	Text	50	None
Employee Injured Number	Number	22	None
Event Number	Text	50	None
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Hospital Name	Text	50	None
Household	Text	15	None
Household: External System ID	Text	30	None
Injured During Working Hours	Picklist	30	None
Kind of Loss	Picklist	30	None
Liability Source	Picklist	30	None
Line of Business	Picklist	30	None
Location of Loss	Picklist	30	None
Loss Code	Picklist	30	None
Loss Date and Time	Date/Time	Not applicable	None
Loss Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Loss Type	Picklist	30	None

Claim Field Name	Data Type	Maximum Length	Comments
Medical Injury Code	Picklist	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Part of Body Injured	Picklist	30	None
People Injured Number	Number	22	None
Picklist Value Group	Text	50	None
Place of Injury	Picklist	30	None
Police Department	Text	50	None
Police Report Number	Text	50	None
Policy	Text	50	The predefined field for the matching record.
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record.
Postal Code	Text	30	None
Province	Text	50	None
Relationship to Insured	Picklist	30	None
Report Date	Date	Not applicable	None
Report Number	Text	50	None
Reported by	Picklist	30	None
Reporter Contact Info	Text	50	None
State	Text	10	None
Status	Picklist	30	None
Time of Death	Date/Time	Not applicable	None
Type of Injury	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Contact Address Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact addresses into Oracle CRM On Demand.

This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. You can import Contact Address fields into Oracle CRM On Demand only if shared addresses are set up for your company. For more information on shared addresses, see Managing Addresses (on page 343).

Default Contact Address Field Name	Data Type	Maximum Length	Comments
Row ID	ID	15	None.
Contact ID	ID	15	None.
Contact External ID	Text	30	None.
Address ID	ID	15	None.
Address External ID	Text	30	None.
Address Type	Picklist	30	The following default address types are available: Residential, Office, Vacation Home, Other, Vanity, Private, Postal, Hospital, and Clinic.
Primary	Checkbox	1	If the Primary field has a value of Y, then the address is a primary address. The values for this field are Y and N.

Contact Book Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact books into Oracle CRM On Demand.

NOTE: To import account book or contact book records, your role must include the Manage Future Books privilege.

This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. For more information on time-based book assignments, see About Time-Based Book Assignments (on page 1437)

Default Book Contacts Field Name	Data Type	Maximum Length	Comments
Name	String	150	If you perform a new import, then it is recommended that you specify a value for the Name field, or the Book Id, not both. If you update an existing record, the Name field is optional.
Book Id	String	15	If you perform a new import, then it is recommended that you specify a value for the Name field, or the Book Id, not both. If you update an existing record, the Book Id field is mandatory.
Book External ID	String	30	None
Contact: Id	String	15	The Contact Id is the row ID of the contact.
Contact External ID	String	30	None
Start Date	Date	None	The date on which the record activation must take place.
End Date	Date	None	The date on which the record activation must end.

Default Book Contacts Field Name	Data Type	Maximum Length	Comments
Future Primary Flag	String	1	If the future primary flag has a value of Y, then the book for the current record is set as primary for the data object when the book is activated. This is based on the Start Date field. The values for this field are: Y and N.

Contact Fields: Import Preparation

If you have separate files to import for accounts and contacts, import the accounts first, and then the contacts. Be sure that your Contacts import file contains valid account names from the Accounts import file.

If you only have a Contacts import file, account records are created based on the account name data found in the Account Name field in the Contacts import file. If the contact record contains alternate address data, Oracle CRM On Demand creates a new account and populates the shipping address with the alternative address. The Billing address remains blank.

If multiple contacts are associated with the same account, the account's address fields are set to the Alternate address values associated with the first contact imported for that account. If the first contact imported does not contain alternate address data-but subsequent records *do,* the account's address fields are blank, since only the first imported contact is considered when setting the values of the account address fields. Therefore, if you are importing only from a Contacts import file, before importing, sort the data by Account Name, then make sure that the first contact for each different Account Name contains the address you want to use for the account.

The following table contains specific information about setting up your CSV file before importing contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Contact Field Name	Data Type	Maximum Length	Comments
Account	Text	100	The text for this field is one of several fields used to match an existing Account record. If no match is found, it is the Account Name for a new Account that gets created as part of the Contact import process. For more information, see About Record Duplicates and External IDs (on page 1635).
Account External ID	Text	30	None

Default Contact Field Name	Data Type	Maximum Length	Comments
Account Location	Text	50	The text for this field is one of several fields used to match an existing Account record. For more information, see About Record Duplicates and External IDs (on page 1635).
Assistant Name	Text	50	None
Assistant Phone #	Phone	40	None
Best Time to Call	Picklist	30	Default values are Early afternoon, Early morning, Evening, Late afternoon, Mid-morning, and Saturday. Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Blocked Reason Code	Picklist	30	Default values are Business, Do Not See, Do Not Ship, HR, and Legal. You can edit this picklist.
Call Frequency	Picklist	30	Default values are No See, 1-2 Times/ Year, 3-4 Times/Year, and >5 Time/Year. Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Cellular Phone #	Phone	40	None
Client Since Date	Date	Not applicable	This field is automatically populated with current date once the Client value is selected in the Contact Type drop-down menu.
Contact Address	Picklist	100	This field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated address record.
Contact Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.

Default Contact Field Name	Data Type	Maximum Length	Comments
Contact Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Contact City	Text	50	This field is not available if shared addresses are set up for your company.
Contact Country	Picklist	30	Default values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Contact Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Contact PO Box/ Sorting Code	Text	50	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Contact Province	Text	50	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Contact Type	Picklist	30	Default valid values: Prospect, Customer, Partner, and Competitor

Default Contact Field Name	Data Type	Maximum Length	Comments
Contact US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import. This field is not available if shared addresses are set up for your company.
Contact Zip/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Credit Score	Number	22	Specific to Oracle CRM On Demand Financial Services Edition.
Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Current Investment Mix	Picklist	30	Default values are Aggressive, Moderate, and Conservative. Specific to Oracle CRM On Demand Financial Services Edition. You can edit this picklist.
Customer ID	Text	11	Specific to Oracle CRM On Demand Financial Services Edition.
Date of Birth	Date	7	Specific to Oracle CRM On Demand Financial Services Edition.
Degree	Picklist	30	Default values are PHD, M.D., D.O., MBA, RN, R.T., Reg. Pharmacist, Master of Science, Dentist, LPN, and Master of Public Health. Specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Department	Text	75	None
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None

Default Contact Field Name	Data Type	Maximum Length	Comments
Email	Text	100	If the Allow Unicode Characters in Email Fields check box on the company profile is selected, then most Unicode (UTF-8) characters are allowed. For more information about the Allow Unicode Characters in Email check box, see Configuring Company Settings (on page 1124). For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses (on page 61).
Experience Level	Picklist	30	Default values are None, Limited, Good, and Extensive. Specific to Oracle CRM On Demand Financial Services Edition. You can edit this picklist.
External Unique ID	Text	30	None
First Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Furigana First Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Furigana Last Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Gender	Picklist	1	Default values are F and M. You can edit this picklist. Specific to Oracle CRM On Demand Financial Services Edition.
Home Phone #	Phone	40	None
Home Value	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Integration ID	Text	30	None
Investment Horizon	Picklist	30	Default values are Short term, Medium term, and Long term. You can edit this picklist. Specific to Oracle CRM On Demand Financial Services Edition.

Default Contact Field Name	Data Type	Maximum Length	Comments
Job Title	Text	75	None
Last Call Date	Date/Time		Specific to Oracle CRM On Demand Life Sciences Edition.
Last Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Lead Source	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List - Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, and Other.
Life Event	Picklist	30	Default values are Marriage, Birth of Child, Retirement, Divorce, and Other. Specific to Oracle CRM On Demand Financial Services Edition.
Manager	Not applicable	Not applicable	It is currently not possible to import data into this field. Its value can only be set directly in the application (on the Contact Edit page).
Manager External ID	Text	30	None
Marital Status	Picklist	30	Default values are Single, Divorced, Married, Partner, Separated, Widowed, and Widower. Specific to Oracle CRM On Demand Financial Services Edition.
Market Potential	Picklist	30	Default values are High, Medium, and Low. Specific to Oracle CRM On Demand Life Sciences Edition.
Middle Name	Text	50	None
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Mr./Ms.	Picklist	30	Default valid values: Miss., Mr., Ms., Mrs., and Dr.
Never Email	Check box	Not applicable	None

Default Contact Field Name	Data Type	Maximum Length	Comments
Objective	Picklist	30	Default values are Capital Preservation, Income, Income/Growth, Balanced, Growth, Aggressive Growth, and International Diversification. Specific to Oracle CRM On Demand Financial Services Edition.
Opt In	Check box	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Opt Out	Check box	Not applicable	Specific to Oracle CRM On Demand Life Sciences Edition.
Own or Rent	Picklist	30	Default values are Own or Rent. Specific to Oracle CRM On Demand Financial Services Edition.
Owner	Email	50	File data must match the User Sign In ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On email ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On email ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Personal Address External System ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, this value must match an existing validated address record.
Picklist Value Group	Text	50	None

Default Contact Field Name	Data Type	Maximum Length	Comments
Primary Goal	Picklist	30	Default values are Saving for child's education, Saving for College, New Home, Accumulating wealth, Estate planning, Preserving my assets, and Retirement. Specific to Oracle CRM On Demand Financial Services Edition.
Private	Check box	Not applicable	This field should be set to the checked state if you want this contact to be visible only to the account owner.
Profession	Text	50	None.
Qualified Date	Date/Time	Not applicable	None.
Rating 1	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5. For more information, see About Fields Displayed As Images (on page 56).
Rating 2	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Rating 3	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Risk Profile	Picklist	30	Default values are Risk Averse, Risk Taker, Conservative, Moderate, and Aggressive. Oracle CRM On Demand Financial Services Edition.
Referred by	Picklist	101	None.
Route	Picklist	30	Default values are Route 1, Route 2, Route 3, and Route 4. Specific to Oracle CRM On Demand Life Sciences Edition.

Default Contact Field Name	Data Type	Maximum Length	Comments
Segment	Picklist	30	Default values are White Collar, Blue Collar, Rural/Farming, Mass Retail, Mass Affluent, High Net Worth, Penta-Millionaires, and Ultra High Net Worth. Specific to Oracle CRM On Demand Financial Services Edition.
Self-Employed	Check box	Not applicable	Specific to Oracle CRM On Demand Financial Services Edition.
Source Campaign	Picklist	100	The campaign that generated the contact.
Status	Picklist	30	This column stores the status of a client or contact. The following values are allowed: Active, Quiet Filed, and Dead Filed.
Stoplight 1	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2. For more information, see About Fields Displayed As Images (on page 56).
Stoplight 2	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Stoplight 3	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Tax Bracket	Number	22	Specific to Oracle CRM On Demand Financial Services Edition.
Tier	Picklist	30	Default values are Gold, Silver, Bronze, Top 100, Top, Medium, and Low. Specific to Oracle CRM On Demand Financial Services Edition.
Time Zone	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the standard valid values.
Total Assets	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Expenses	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Income	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.

Default Contact Field Name	Data Type	Maximum Length	Comments
Total Liabilities	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Total Net Worth	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Type	Picklist	30	Default values are Prospect, Customer, Partner, and Competitor.
Work Fax #	Phone	40	None
Work Phone #	Phone	40	None
YTD Sales	Currency	15	Specific to Oracle CRM On Demand Life Sciences Edition.

Related Topics

See the following topics for related information:

- Contact Fields (on page 305)
- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Contact State License Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact state licenses into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Contact State License Field Name	Data Type	Maximum Length	Comments
Contact	Text	15	None
Expiration Date	Text	7	The date on which the medical license for this contact will expire, if known.
License Number	Text	30	The required license number for the contact in the designated state.
State	Text	30	A state in the United States or a province in Canada (optional).

Default Contact State License Field Name	Data Type	Maximum Length	Comments
Status	Text	30	The default values for the status of the license are: Blank, Active, or Expired.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Contact State Licenses (on page 530)

Contact Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing contact teams into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Contact Team Field Name	Data Type	Maximum Length	Comments
Contact Access	Picklist	15	Default valid values: Readonly, Edit, Full, No Access. You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Contact Full Name	Text	60	None
Team Role	Picklist	30	Default valid values: Owner, Executive Sponsor, Consultant, Partner, Other
User ID	Text	50	None
Contact External ID	Text	30	None
User External ID	Text	30	None

Related Topics

See the following topics for related information:

- Sharing Records (Teams) (on page 146)
- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Course Enrollment Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing course enrollment data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Course Enrollment Field Name	Field Type	Maximum Length	Comments
Candidate Name	Picklist	15	None.
Completion Date	Date	22	None.
Course Name	Picklist	15	It is recommended that the course name be unique.
Currency	Picklist	15	None.
Description	Text	250	None.
Enrollment Date	Date	22	This field displays the current date during record creation by default, but you can modify it during and after record creation.
Enrollment Number	Text	100	None.
Enrollment Status	Picklist	30	The default valid values are as follows: Enrolled, Completed, and Incomplete.
Exchange Date	Date	Not applicable	None.
Objective	Picklist	15	None.
Offering Partner	Picklist	15	The third-party company that the candidate is enrolling with for the course. The entry is usually from the list of offering partners for the course.
Owner	Picklist	15	None.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Course Fields (on page 489)

Course Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing course data into Oracle CRM On Demand. This information supplements the guidelines given in the topic, Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Course Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.
Available To	Date	7	None.
Company	Text	100	The company where the course contact works.
Contact	Picklist	15	Use this field if the course contact is already present in Oracle CRM On Demand.
Course Fee	Currency	22	None.
Course ID	Text	30	It is recommended that the internal identifier for the course be unique. Oracle CRM On Demand does not enforce uniqueness.
Course Length (Days)	Number	22	None.
Description	Text	255	None.
Duration (Hours)	Number	22	None.
Email	Text	100	The email address for the course contact.
Exam	Picklist	15	None.
First Name	Text	50	Use this field to enter the course contact's first name only if the contact is not present in Oracle CRM On Demand.
Format	Picklist	30	The default valid values are as follows: Instructor Led, CBT, and Self-Paced.
Hands-on Lab	Check box	1	None.
Last Name	Text	50	Use this field to enter the course contact's last name only if the contact is not present in Oracle CRM On Demand.

Medium	Picklist	30	The default valid values are as follows: Classroom, Online, and CD/DVD.
Name	Text	100	It is recommended that the course name be unique.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the course contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.
Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Type	Picklist	30	The default valid values are as follows: Pre-Sales, Post-Sales, Technical, Service, Installation, Upgrade, Design, and Security.
Website	Text	100	The URL to a page that contains additional course information.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Course Fields (on page 489)

Coverage Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing coverage data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for coverage data only.

Coverage Field Name	Data Type	Maximum Length	Comments
Begin	Date	Not applicable	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Coverage	Picklist	30	The predefined field for the matching record
Coverage Name	Text	100	None
Coverage Product	Text	15	None
Coverage Product: External System ID	Text	50	Also known as the external unique ID
Coverage Status	Picklist	30	None
Currency Code	Picklist	20	None
Deductible	Currency	22	None
End	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Individual Limit	Currency	22	None
Insured Amount	Currency	22	None
Insured Property	Text	30	None
Insured Property: External System ID	Text	50	Also known as the external unique ID.
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None

Coverage Field Name	Data Type	Maximum Length	Comments
Policy	Text	15	The predefined field for the matching record.
Policy: External System ID	Text	50	None
Status	Picklist	30	None
Total Limit	Currency	22	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Custom Object Field: Import Preparation

The following tables contain specific information about setting up your CSV file before importing custom object fields for custom objects into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Custom Object 01, Custom Object 02, and Custom Object 03

The information in the following table is valid for Custom Object 01, Custom Object 02, and Custom Object 03 only.

Default Custom Object Field Name	Data Type	Maximum Length
Name	Text	100
Account Location	Text	50
Description	Text	16,350
Custom Objects 04-15	Text	50
Division	Text	50
Custom Objects 04-15 External Unique ID	Text	30
Integration ID	Text	30

Default Custom Object Field Name	Data Type	Maximum Length
External Unique ID	Text	30
Owner	Email	50
Picklist Value Group	Text	50
Currency	Text	20
Quick Search 1	Text	50
Quick Search 2	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Number	Number	16
Indexed Date	Date/Time	32
Indexed Currency	Currency	25
Indexed Checkbox	Boolean	1
Type	Text	30
Account	Text	100
Campaign	Text	100
Contact	Text	255
Custom Object 01	Text	50
Custom Object 02	Text	50
Custom Object 03	Text	50
Dealer	Text	100

Default Custom Object Field Name	Data Type	Maximum Length
Event	Text	50
Fund	Text	50
Household	Text	50
Lead	Text	255
Opportunity	Text	100
Portfolio	Text	100
Product	Text	100
Service Request	Text	64
Solution	Text	100
Vehicle	Text	100
Account External ID	Text	30
Campaign External ID	Text	30
Contact External ID	Text	30
Custom Object 01 External ID	Text	30
Custom Object 02 External ID	Text	30
Custom Object 03 External ID	Text	30
Lead External ID	Text	30
Opportunity External ID	Text	30
Owner External ID	Text	30
Portfolio External ID	Text	30
Product External ID	Text	30
Service Request External ID	Text	30
Solution External ID	Text	30

Custom Objects 04 and higher

The information in the following table is valid for custom objects 04 and higher only.

Default Custom Object Field Name	Data Type	Maximum Length
Account	Text	100
Activity	Text	100
Book	String	150
Book:ID	String	15
Campaign	Text	100
Custom Objects 01-15	Text	50
Dealer	Text	100
Description	Text	16,350
Exchange Date	Date	32
External Unique ID	Text	30
Event	Text	50
Fund	Text	50
Fund Request	Text	50
Household	Text	1
Indexed Checkbox	Boolean	1
Indexed Currency	Currency	25
Indexed Date	DateTime	32
Indexed Number	Number	16
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30

Default Custom Object Field Name	Data Type	Maximum Length
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Integration ID	Text	30
Lead	Text	225
Name	Text	100
Opportunity	Text	100
Owner	Email	50
Portfolio	Text	100
Product	Text	100
Quick Search 1	Text	50
Quick Search 2	Text	50
Service Request	Text	64
Type	Text	30
Vehicle	Text	100
Account External Unique ID	Text	30
Activity External Unique ID	Text	30
Asset External System ID	Text	30
Campaign External Unique ID	Text	30
Company External System ID	Text	30
Contact External Unique ID	Text	30
Custom Objects 01-15 External Unique IDs	Text	30
Dealer External Unique ID	Text	30

Default Custom Object Field Name	Data Type	Maximum Length
Fund Request External Unique ID	Text	30
Household External Unique ID	Text	30
Opportunity External Unique ID	Text	30
Owner External Unique ID	Text	30
Portfolio External Unique ID	Text	30
Product External Unique ID	Text	30
Service Request External Unique ID	Text	30
Solution Request External Unique ID	Text	30
Vehicle External Unique ID	Text	30

Damage Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing damage data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for damage data only.

Damage Field Name	Data Type	Maximum Length	Comments
Claim	Text	15	The predefined field for the matching record.
Claim: External System ID	Text	50	None
Currency Code	Picklist	20	None
Damage	Text	50	None

Damage Field Name	Data Type	Maximum Length	Comments
Damage Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
Damage Name	Text	50	The predefined field for the matching record.
Damaged Property Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
Damaged Property Type	Text	50	None
Division	Text	50	None
Estimate Amount	Currency	22	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Integration Id	Text	30	None
Insurance Property	Text	15	The predefined field for the matching record.
Insurance Property: External System ID	Text	50	None
Owner	Text	15	None
Picklist Value Group	Text	50	None
Property #	Number	22	None

Damage Field Name	Data Type	Maximum Length	Comments
Owner: External Unique ID	Text	30	None

Related Topics

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Deal Registration Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing deal registrations into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Approval Status	Picklist	30	The valid values for this field are: Pending Approval, Approved, Rejected, Returned, Canceled, and Expired.
Approved Date	Date	Not applicable	None
Associated Contact	Picklist	100	None
Associated Customer	Picklist	100	None
Associated Lead	Text	100	None
Associated Lead: External Unique ID	Text	30	None
Associated Lead: First Name	Text	50	None
Associated Lead: Last Name	Text	50	None
Associated Lead: Integration ID	Text	30	None
Associated Lead: Last Name	Text	50	None

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Associated Opportunity	Picklist	100	None
Cell Phone	Text	40	None
City	Text	50	None
Close Date	Date	Not applicable	None
Company Name	Text	50	None
Converted to Opportunity	Checkbox	Not applicable	None
Country	Picklist	50	None
Current Approver	Picklist	100	None
Created: Date	DateTime	Not applicable	None
Currency	Picklist	Not applicable	You cannot edit this picklist. Therefore, the values you import must match the valid values.
Deal Size	Currency	15	None
Description	Text	255	None
Division	Text	50	None
Email	Text	50	None
Exchange Rate	Date	Not applicable	None
Expiration Date	Date	Not applicable	None
External ID	Text	40	None
Fax	Text	40	None
Final Approver	Picklist	100	None
First Name	Text	50	None
Job Title	Text	75	None
Last Name	Text	50	None

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
Middle Name	Text	50	None
Modified: Date	DateTime	Not applicable	None
Mr./Ms.	Picklist	30	None
Name	Text	100	This field is required by default. Ensure that all records contain values in this field before you perform an import.
New Contact	Checkbox	Not applicable	None
New Customer	Checkbox	Not applicable	None
New Opportunity	Checkbox	Not applicable	This field indicates if the opportunity associated with the deal registration is a new one.
Next Step	Text	250	None
Objective	Text	100	None
Objective: External Unique ID	Text	50	None
Owner	Picklist	30	The data in this field must match the user ID of an existing user of Oracle CRM On Demand. If a record does not contain a valid value for this field (including no value), its value is set to the user ID of the user performing the import. If this field is not mapped to a valid import field when running the Import Assistant, the owner is set to the user ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Owner Partner Account	Picklist	100	This field automatically displays the partner company of the owner of the deal registration by default. This field is read-only. The upload process in Oracle CRM On Demand cannot update this field.
Originating Partner Account	Picklist	100	The partner who originally discovered the opportunity. This partner is typically the

Default Deal Registration Field Name	Data Type	Maximum Length	Comments
			same as the principal partner, but can be different. This field is optional.
Partner Program	Picklist	50	None
Picklist Value Group	Text	50	None
Postal Code	Text	30	None
Principal Partner	Picklist	100	The primary partner is responsible for the deal registration. This field together with the Principal Partner Location field uniquely identifies a partner. This field cannot be null.
Principal Partner Location	Text	50	The location of the primary partner mentioned in the previous cell. This field together with the Principal Partner field uniquely identifies a partner. This field can be null.
Product Interest	Text	100	None
Reject Reason	Picklist	30	None
Special Price Reqd.	Checkbox	Not applicable	None
State	Picklist	30	None
Street	Text	100	None
Submission Status	Picklist	30	The valid values for this field are: Not Submitted, Submitted, and Recalled.
Submitted Date	DateTime	Not applicable	None
Support Reqd.	Checkbox	Not applicable	None
Telephone#	Text	40	None
Type	Picklist	30	The default valid values for this field are: Standard and Nonstandard.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)

- Importing Your Data (on page 1827)

Dealer Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing dealer fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

NOTE: This section is specific to Oracle CRM On Demand Automotive Edition.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Name	Text	100	None
Site	Text	50	None
Site	Text	50	None
Parent Dealer	Text	100	None
Status	Text	255	None
Parent Site	Text	50	None
Phone Number	Phone	40	None
E-mail	Text	50	None
URL	Text	100	None
Status	Text	30	None
Fax Number	Phone	40	None
Currency	Text	20	None
Stage	Text	30	None
Ranking	Number	16	None

Default Dealer Field Name	Data Type	Maximum Length	Comments
Billing Address	Picklist	100	This field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Billing Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Billing Address 2, 3	Text	100 each	This field is not available if shared addresses are set up for your company.
Billing City	Text	50	This field is not available if shared addresses are set up for your company.
Billing Country	Picklist	30	The default valid values are the names of all the countries in the world. The valid value for the U.S. is *USA.* Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Billing PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, then map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Billing Province	Text	50	If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Billing US State	Picklist	2	The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data. This field is not available if shared addresses are set up for your company.
Billing Zip/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Bill to Address External ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Shipping Address	Text	30	This field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Shipping Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Shipping Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Shipping City	Text	50	This field is not available if shared addresses are set up for your company.
Shipping Country	Picklist	30	The default valid values are the names of all the countries in the world. The valid value for the U.S. is *USA*. Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Shipping PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Shipping Province	Text	50	If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.

Default Dealer Field Name	Data Type	Maximum Length	Comments
Shipping US State	Picklist	2	The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before importing data. This field is not available if shared addresses are set up for your company.
Shipping Zip/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Shipping to Address External ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
External Unique ID	Text	30	None
Parent Dealer External ID	Text	30	None
Primary Owner Id	Id	15	None
Dealer Type	Text	30	None
Modified: Date External	Date/Time	32	None
Owner	Email	50	None
Modified By	Text	255	None
Row Id	Id	15	None
Integration ID	Text	30	None
Custom Object *N*	Text	50	None
Indexed Picklist 1	Text	30	None
Indexed Picklist 2	Text	30	None

Default Dealer Field Name	Data Type	Maximum Length	Comments
Indexed Picklist 3	Text	30	None
Indexed Picklist 4	Text	30	None
Indexed Picklist 5	Text	30	None
Indexed Picklist 6	Text	30	None
Indexed Number	Number	16	None
Indexed Date	Date/Time	32	None
Indexed Currency	Currency	25	None
Indexed Long Text	Text	255	None
Indexed Short Text 1	Text	100	None
Indexed Short Text 2	Text	100	None
Indexed Checkbox	Boolean	1	None

Event Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing Event fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. If you do not see a specific field when you try to import your data, then check with your company administrator to determine the new name for the field.

Event Field Name	Data Type	Maximum Length	Comments
Row ID	ID	15	None.
Product	Picklist	100	None.
Product Category	Picklist	100	None.
Owner Alias	Text	50	None.
Description	Text	250	None.

Event Field Name	Data Type	Maximum Length	Comments
Division	Text	50	None.
Session Details	Text	500	None.
Owner First Name	Text	50	None.
Owner Last Name	Text	50	None.
Primary Owner ID	ID	15	None.
Picklist Value Group	Text	50	None.
Integration ID	Text	30	None.
External System ID	Text	30	None.
Indexed Number	Integer	Not applicable	The value in this field must be a valid numeric value between -2147483648 and 2147483647.
Indexed Picklist 1	Picklist	30	None.
Indexed Picklist 2	Picklist	30	None.
Indexed Picklist 3	Picklist	30	None.
Indexed Picklist 4	Picklist	30	None.
Indexed Picklist 5	Picklist	30	None.
Indexed Picklist 6	Picklist	30	None.
Indexed Long Text	Text	255	None.
Indexed Short Text 1	Text	40	None.
Indexed Short Text 2	Text	40	None.
Type	Picklist	15	None.
Location	Text	100	None.
Max Attendees	Integer	Not applicable.	The value in this field must be a valid numeric value between 0 and 1000000.

Event Field Name	Data Type	Maximum Length	Comments
Name	Text	150	This field is required.
Event Objective	Text	500	This field is required.
Start Date	Date/Time	Not applicable.	None.
Budget	Currency	15	None.
CME Credit	Integer	Not applicable.	The value in this field must be a valid numeric value between -2147483648 and 2147483647.
Confirm Date	Date/Time	Not applicable.	None.
End Date	Date/Time	Not applicable.	None.
Status	Picklist	30	None.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Exam Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing exam data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Exam Field Name	Field Type	Maximum Length	Comments
Available From	Date	7	None.
Available To	Date	7	None.
Company	Text	100	None.

Contact	Picklist	15	Use this field if the exam contact is already present in Oracle CRM On Demand.
Description	Text	255	None.
Email	Text	100	The email address for the exam contact.
Exam Fee	Currency	22	None.
Exam ID	Text	100	It is recommended that the internal identifier for the course be unique.
First Name	Text	50	Use this field to enter the exam contact's first name only if the contact is not present in Oracle CRM On Demand.
Format	Picklist	30	The default valid values are as follows: Multiple Choice, Q&A, and Blended.
Grading Method	Picklist	30	The default valid values are as follows: Grades, Points, and Scores.
Last Name	Text	50	Use this field to enter the exam contact's last name only if the contact is not present in Oracle CRM On Demand.
Maximum Score	Number	22	None.
Medium	Picklist	30	The default valid values are as follows: Computer-Based, Paper-Based, and Blended.
Name	Text	100	It is recommended that the exam name be unique.
Number of Questions	Number	22	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Passing Score	Number	22	None.
Payment Options	Picklist	30	The default valid values are as follows: Cheque, Credit Card, Cash, and Earned Funds.
Phone	Phone	40	The phone number for the exam contact.
Primary Product	Picklist	15	None.
Primary Product Category	Picklist	15	None.

Status	Picklist	30	The default valid values are as follows: Draft, Planned, Available, Obsolete, and Inactive.
Time Allowed (Minutes)	Number	22	None.
Type	Picklist	30	The default valid values are as follows: Proctored and Online. An exam is considered to be *proctored* when the candidates are supervised during the exam.
Validity (Months)	Number	22	None.
Website	Text	100	The URL to a page that contains additional exam information.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Exam Fields (on page 498)

Exam Registration Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing exam registration data into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Exam Registration Field Name	Field Type	Maximum Length	Comments
Administering Partner	Picklist	15	The third-party company administering the exam. The entry is usually from the list of administering partners for the exam.
Candidate Name	Picklist	15	None.
Completion Date	Date	7	None.
Currency	Picklist	15	None.
Description	Text	255	None.
Exam Name	Picklist	15	None.

Exchange Date	Date	Not applicable	None.
Grade Achieved	Text	50	None.
Objective	Picklist	15	None.
Owner	Picklist	15	None.
Score Achieved	Number	22	None.
Score Expires On	Date	7	None.
Registration Date	Date	7	This field displays the current date during record creation, but you can modify it during and after record creation.
Registration Number	Text	50	Exam registration numbers are usually unique.
Registration Status	Picklist	30	The default valid values are as follows: Registered, Passed, and Failed.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Exam Fields (on page 498)

Financial Account Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial accounts in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial account data only.

Financial Account Field Name	Data Type	Maximum Length	Comments
Account Holder	Text	15	None
Account Holder: External System ID	Text	30	None
Balance	Currency	22	None

Financial Account Field Name	Data Type	Maximum Length	Comments
Balance as of	Date/Time	Not applicable	None
Branch	Text	15	None
Branch: External System ID	Text	30	None
Business Account	Text	15	None
Business Account: External System ID	Text	30	None
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Division	Text	50	None
Exchange Date	Date/Time	Not applicable	None
External ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	50	The predefined field for the matching record.
Financial Account Number	Text	50	None
Financial Advisor	Text	15	None
Financial Advisor: External System ID	Text	30	None
Held Away	Boolean	1	None
Held Away Institution	Text	15	None

Financial Account Field Name	Data Type	Maximum Length	Comments
Held Away Institution: External System ID	Text	30	The external unique ID of the held away institution (business account) linked to this record.
Home Branch	Picklist	30	None
Household	Text	15	None
Household: External System ID	Text	30	None
Integration ID	Text	30	None
Joint	Boolean	1	None
Open Date	Date	Not applicable	None
Owner: External System ID	Text	30	None
Parent Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record.
Picklist Value Group	Text	50	None
Portfolio: External System ID	Text	30	None
Primary Account	Boolean	1	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Financial Account Holders Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial account holders into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial-account-holder data only.

Financial Account Holder Field Name	Data Type	Maximum Length	Comments
Business Account	Text	15	The predefined field for the matching record
Business Account: External System ID	Text	30	None
Currency Code	Picklist	20	None
Division	Text	50	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record
Financial Account Holder	Text	15	None
Financial Account Holder: External System ID	Text	30	None
Financial Account Holders Name	Text	50	The predefined field for the matching record
Household	Text	15	None
Household: External System ID	Text	30	None
Joined Date	Date	Not applicable	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Picklist Value Group	Text	50	None
Primary Contact	Boolean	1	None

Financial Account Holder Field Name	Data Type	Maximum Length	Comments
Role	Picklist	30	The predefined field for the matching record

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Financial Account Holdings Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial account holdings into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial-account-holdings data only.

Financial Account Holdings Field Name	Data Type	Maximum Length	Comments
Currency Code	Picklist	20	None
Division	Text	50	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record
Financial Account Holdings Name	Text	50	The predefined field for the matching record

Financial Account Holdings Field Name	Data Type	Maximum Length	Comments
Financial Product	Text	15	The predefined field for the matching record
Financial Product: External System ID	Text	50	The external unique ID of the financial product linked to this record
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Performance	Text	22	None
Picklist Value Group	Text	50	None
Purchase Date	Date/Time	Not applicable	None
Purchase Price	Currency	22	None
Quantity	Number	22	None
Value	Currency	22	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Financial Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial plans in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

Financial Plan

The information in the following table is valid for Financial Plan only.

Financial Plan Field Name	Data Type	Maximum Length	Comments
Approved by Contact	Boolean	1	None
Business Account	Text	15	None
Business Account: External System ID	Text	30	None
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Contact	Text	15	None
Contact: External System ID	Text	30	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Division	Text	50	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record.
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record.
Financial Plan Name	Text	50	The predefined field for the matching record.
Household	Text	15	None
Household: External System ID	Text	30	None

Financial Plan Field Name	Data Type	Maximum Length	Comments
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Picklist Value Group	Text	50	None
Portfolio	Text	15	None
Portfolio: External System ID	Text	30	None
Sent to Contact	Boolean	1	None
Status	Picklist	30	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Financial Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial products in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial product only.

Financial Product Field Name	Data Type	Maximum Length	Comments
Category	Picklist	30	None
Class	Picklist	30	None
Currency Code	Picklist	20	None
Current Price	Currency	20	None

Financial Product Field Name	Data Type	Maximum Length	Comments
Current Price Last Updated	Date/Time	Not applicable.	None
Division	Text	30	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Product ID	Text	50	None
Financial Product Name	Text	50	The predefined field for the matching record.
Financial Product Overview	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters.
Integration ID	Text	30	None
MDM Product Hub ID	Text	50	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Parent Financial Product	Text	15	None
Parent Financial Product: External System ID	Text	50	The external unique ID of the parent financial product linked to this record.
Parent Financial Product: System ID	Text	50	Also known as the external unique ID.
Picklist Value Group	Text	50	None
Price Source	Text	50	Also known as the current price source.
Product Catalogue	Text	250	None

Financial Product Field Name	Data Type	Maximum Length	Comments
Product URL	Text	250	None
Sub-Class	Picklist	30	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Financial Transactions Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing financial transactions in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for financial transactions only.

Financial Transactions Field Name	Data Type	Maximum Length	Comments
Currency Code	Picklist	20	None
Exchange Date	Date/Time	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Financial Account	Text	15	The predefined field for the matching record.
Financial Account: External System ID	Text	50	The external unique ID of the financial account linked to this record.

Financial Transactions Field Name	Data Type	Maximum Length	Comments
Financial Product	Text	15	The predefined field for the matching record.
Financial Product: External System ID	Text	50	The external unique ID of the financial product linked to this record.
Financial Transaction Parent	Text	15	None
Financial Transaction Parent: External System ID	Text	50	The external unique ID of the financial product linked to this record.
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External Unique ID	Text	30	None
Quantity	Number	22	None
Transaction Date Time	Date/Time		None
Transaction ID	Text	50	The predefined field for the matching record.
Transaction Period	Text	50	None
Transaction Price	Currency	22	None
Transaction Source	Text	50	None
Transaction Type	Picklist	30	None
Value	Currency	22	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

HCP Contact Allocation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing HCP contact allocation fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default HCP Contact Allocation Field Name	Data Type	Maximum Length	Comments
HCP Contact Allocation ID	Varchar	15	Indicates the row identification number.
Allocation Type	Picklist	30	The default values for this field are Detail Allocation, Sample Allocation, Promotional Item Allocation, and Sample Request Allocation.
Start Date	Date Time	7	This field is required.
Currency	Picklist	15	None.
Exchange Date	Date	Not applicable	None.
Division	Text	50	None.
End Date	Date Time	7	If an end date is defined for the HCP Contact Allocation record, then the end date must be later than the start date.
Qty Remaining	Number	22	When the HCP contact allocation is first created, the Allocation Qty and Qty Remaining fields must have the same positive value. Quantity fields must have integer values.
Qty Distributed	Number	22	When the HCP contact allocation is first

Default HCP Contact Allocation Field Name	Data Type	Maximum Length	Comments
			created, the Qty Distributed field must be zero. Quantity fields must have integer values.
Allocation Qty	Number	22	When the HCP contact allocation is first created, the Allocation Qty and Qty Remaining fields must have the same positive value. Quantity fields must have integer values.
Contact ID	Varchar	15	Indicates the row identifier for the contact or health care professional for whom the allocations are defined.
Product ID	Varchar	15	Indicates the row identifier for the product or sample for which the allocations are defined for the specific contact or health care professional.
Picklist Value Group	Text	50	None.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Insurance Property Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing insurance property data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for insurance property data only.

Insurance Property Field Name	Data Type	Maximum Length	Comments
Amount	Currency	22	None
Currency Code	Picklist	20	None
Description	Text	16,350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Integration ID	Text	30	None
Owner	Text	15	None
Owner: External System ID	Text	30	None
Picklist Value Group	Text	50	None
Policy	Text	15	The predefined field for the matching record.
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record.
Sequence	Number	22	The predefined field for the matching record.
Type	Picklist	30	The predefined field for the matching record.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Inventory Audit Report Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing inventory audit reports into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type

Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Inventory Audit Report Field Name	Data Type	Maximum Length	Comments
Comments	Note	255	None
Completed Date	Date/Time	7	None
Inventory Period	Text	15	The reference field for holding the Inventory Period Object ID.
Reason	Picklist	30	None
Reported Date	Date/Time	7	None
Status	Picklist	30	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Inventory Period Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing inventory periods into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Inventory Period Field Name	Data Type	Maximum Length	Comments
Active	Boolean	1	This field indicates whether the inventory period is active or inactive.
End Date	Date/Time	7	This field is empty if the inventory period is active.

Default Inventory Period Field Name	Data Type	Maximum Length	Comments
Reconciled	Boolean	1	This field indicates whether the inventory period has been reconciled or not.
Start Date	Date/Time	7	The starting date of the inventory period.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Invitee Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing Invitee fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. If you do not see a specific field when you try to import your data, then check with your company administrator to determine the new name for the field.

Invitee Field Name	Data Type	Maximum Length	Comments
Invitee Status	Text	30	The default value is Pending. The other values are: Attended, Cancelled, Confirmed, Declined, and Wait List.
Contact Name	Text	30	Select a contact from the associated applet.
Job Title	Text	30	The job title for the contact.
Type	Text	30	The type of contact.
Email	Text	30	None
Phone#	Text	30	None
Session Detail	Text	30	None
Comments	Text	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Involved Party Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing involved party data in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for involved party data only.

Involved Party Field Name	Data Type	Maximum Length	Comments
Claim	Text	15	The predefined field for the matching record.
Claim: External System ID	Text	50	None
Contact	Text	15	The predefined field for the matching record. The Contact field is a concatenation of the last name and first name of the contact.
Contact: External System ID	Text	30	None
Currency Code	Picklist	20	None
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Injury Description	Text	16350	If a description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked notes, each with a maximum limit of 16,350 characters.
Injury Summary	Text	250	None
Integration ID	Text	30	None

Involved Party Field Name	Data Type	Maximum Length	Comments
Involved Party Name	Text	50	None
Location	Picklist	30	None
Owner	Text	15	The owner of the record.
Owner: External System ID	Text	30	None
Role	Picklist	30	The predefined field for the matching record.
Role in Accident	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Lead Event Fields: Import Preparation

The following table contains specific information about setting up your records before importing lead events into Oracle CRM On Demand. It supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Lead Event Field Name	Data Type	Maximum Length	Comments
Event	Text	50	Name of the event.
Event ID	ID	15	None
Event External System ID	ID	15	External system ID of event.
Lead	Text	50	Name of the lead.
Lead ID	ID	15	None
Lead External Unique ID	ID	15	External unique ID of the lead.
Row ID	ID	15	None

Lead Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing leads into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Lead Field Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Alias	Text	50	None
Annual Revenues	Currency	15	None
Approximate Income	Currency	15	This is the amount of the approximate annual income.
Associated Account	Text	100	None.
Associated Contact	Text	101	The maximum number of characters allowed is 101. The first name can take up to 50 characters, followed by a single space, and the last name can take up to 50 characters, giving a total of 101 characters for the field.
Associated Deal Registration	Text	100	None
Associated Deal Registration: External ID	Text	50	None
Associated Opportunity	Not applicable	Not applicable	If you are importing a converted lead, this field's value must match an existing opportunity name.
Billing Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (see About Countries and Address Mapping on page 1615).
Billing Address 2, 3	Text	100 each	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping

Default Lead Field Name	Data Type	Maximum Length	Comments
			(see About Countries and Address Mapping on page 1615).
Billing City	Text	50	None
Billing Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 1615)).
Billing PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (see About Countries and Address Mapping on page 1615)).
Billing Province	Text	30	If your file contains non-U.S. addresses, map the following address items (or other equivalents to the U.S. State) to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast.
Billing US State	Picklist	2	Default valid values: Standard two-letter abbreviations for all the U.S. states (all capital letters). The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import.
Billing Zip/Post Code	Text	50	None
Campaign	Not applicable	Not applicable	This value is specified when using the Oracle CRM On Demand Lead Import Assistant. It is not possible to directly set values for the Campaign field in the import data.
Campaign External ID	Text	30	None
Cellular Phone #	Phone	40	None

Default Lead Field Name	Data Type	Maximum Length	Comments
Company	Text	100	None
Contact External ID	Text	30	None
Created By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Date of Birth	Date	Not applicable	None
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None
Email	Text	100	If the Allow Unicode Characters in Email Fields check box on the company profile is selected, then most Unicode (UTF-8) characters are allowed. For more information about the Allow Unicode Characters in Email check box, see Configuring Company Settings (on page 1124). For information about the characters that are supported for use in email addresses, see About Special Characters in Email Addresses (on page 61).
Estimated Close Date	Date	7	None
External Unique ID	Text	30	None
First Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Furigana First Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).
Furigana Last Name	Text	50	The Furigana equivalent of the Kanji (for Japanese only).

Default Lead Field Name	Data Type	Maximum Length	Comments
Industry	Picklist	50	Oracle CRM On Demand does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import. Alternatively, your company's Oracle CRM On Demand Administrator can create a custom Lead field that contains the valid values that you expect in your import data. This allows you to import your data into that custom field instead of this field. Default valid values: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications
Integration ID	Text	30	None
Job Title	Text	75	None
Last Name	Text	50	This field is required by default. Make sure all records have values in this field before import.
Lead Currency	Text	20	None
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Mr./Ms.	Picklist	30	Default valid values: Miss., Mr., Ms., Mrs., and Dr.
Never Email	Check box	Not applicable	None
Next Step	Text	250	None
Number of Employees	Integer	15	None
Opportunity External ID	Text	30	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import.

Default Lead Field Name	Data Type	Maximum Length	Comments
			If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.
Picklist Value Group	Text	50	None
Potential Revenue	Currency	15	None
Primary Phone #	Phone	40	None
Product Interest	Text	100	None
Profession	Text	50	This is the specified profession or occupation.
Rating	Picklist	30	Default valid values: A, B, C, and D
Rating 1	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5. For more information, see About Fields Displayed As Images (on page 56).
Rating 2	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Rating 3	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Reassign Lead Owner	Not applicable	Not applicable	This value is specified for all leads in a specific import when using the Oracle CRM On Demand Lead Import Assistant. It determines whether the imported leads are assigned to new owners based on Lead Assignment Rules defined for your company.
Referred By	Picklist	101	None
Sales Person	Picklist	30	None
Sales Person External ID	Text	30	None
Source	Picklist	30	Default valid values: Advertisement, Direct Mail, Email, Event - Seminar, Event - Trade Show, Event - Other, List -

Default Lead Field Name	Data Type	Maximum Length	Comments
			Purchased, List - Rented, Referral - Employee, Referral - External, Web Site, and Other
Status	Not applicable	Not applicable	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values and they must match the business logic.
Stoplight 1	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2. For more information, see About Fields Displayed As Images (on page 56).
Stoplight 2	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Stoplight 3	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Web Site	Text	100	None
Work Fax #	Phone	40	None

Related Topics

See the following topics for related information:

- Leads Fields (on page 258)
- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

MDF Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing market development fund (MDF) requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default MDF Request Field Name	Data Type	Maximum Length	Comments
Amount PreApproved	Number	22	The total amount that the brand owner approved for the marketing activity.
Amount Requested	Number	22	The total amount that the partner is requesting for the marketing activity.

Default MDF Request Field Name	Data Type	Maximum Length	Comments
Approval Status	Varchar	30	The current approval status for the MDF request.
Approver	Varchar	15	The name of the current approver.
Campaign	Varchar	15	The campaign with which the MDF is associated.
Category	Varchar	30	The category to which the MDF request belongs.
Claim Decision Date	Date	7	The date on which a decision was made for the claim.
Claim Status	Varchar	30	Indicates the status of the MDF claim.
Description	Varchar	250	None
Division	Text	50	None
Due Date	Date	7	The date by which the request must be processed.
End Date	UTC Date Time	7	The date and time by which the marketing activity ends.
Expiration Date	UTC Date Time	7	The date after which the MDF request is no longer valid.
Fund	Varchar	15	The name of the fund associated with the MDF request.
Last Approved By	Varchar	15	The name of the person who most recently approved the request.
MDF Request Currency	Varchar	20	None
Marketing Purpose	Varchar	30	The marketing reason for the MDF request.
Owner	Varchar	15	The owner of the record.
Owner Partner Account	Varchar	15	The partner account for which the owner works.

Default MDF Request Field Name	Data Type	Maximum Length	Comments
Partner Program	Varchar	15	The partner program with which the request is associated.
Picklist Value Group	Text	50	None
Pre-Approval Date	Date	7	The date and time that the MDF request was preapproved.
Principal Partner Account	Varchar	15	The partner company that is leading the effort on the MDF request.
Reason Code	Varchar	30	The reason why a special pricing request was returned or rejected.
Region	Varchar	30	The region for which the MDF request is being made.
Request Date	Date	7	The date and time that the MDF request was created.
Request Name	Varchar	50	The name of the MDF request.
Start Date	UTC Date Time	7	The date and time when the marketing activity starts.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	UTC Date	7	The date and time when the request was submitted.
Total Claim Amount Approved	Number	22	The total claim amount that was approved for the partner.
Total Claim Amount Requested	Number	22	The total claim amount that was requested by the partner.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Message Response Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing message responses into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field

Type Guidelines for Importing Data (on page 1651). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Message Response Field Name	Data Type	Maximum Length	Comments
Account	Text	15	None
Activity	Text	15	None
Comments	Text	250	None
Contact	Text	15	None
Division	Text	50	None
Enable Followup	Boolean	1	None
End Time	Date/Time	7	None
External Unique ID	Text	50	None
Picklist Value Group	Text	50	None
Plan	Text	15	None
Plan Item	Text	15	None
Response	Text	30	None
Section	Text	100	None
Sequence Number	Numeric	22	None
Start Time	Date/Time	7	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Adjusting Message Responses (on page 216)

Messaging Plan Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plans into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Messaging Plan Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	This field describes the targeted audience for this message plan, for example, cardiac surgeons.
Code	Text	50	This field tracks messaging plans in different Row IDs. For example, if you revise a messaging plan, this field creates a copy of the messaging plan with an incremented version number.
Disclosure Mandatory	Boolean	1	When this field is selected, a disclosure message is displayed.
Division	Text	50	None
Enable Followup	Boolean	1	None
Expiration Date	DateTime	7	The date on which the messaging plan ends.
External Unique ID	Text	50	None
Lock Sequence	Boolean	1	This field locks the messaging plan, which prevents users from changing the sequence, or removing messages from a messaging plan.
Name	Text	200	The name of the messaging plan or the personalized messaging plan.
Picklist Value Group	Text	50	None
Priority	Number	22	None
Release Date	DateTime	7	The release date of the messaging plan.

Default Messaging Plan Field Name	Data Type	Maximum Length	Comments
Segment	Text	50	This field describes the market segment; that is, the group of accounts, to which the message plan is targeted, for example, tertiary care hospitals. It shows the recommended messaging plans to sales representatives when they are planning calls.
Skin	Text	30	When the messaging planner is opened for editing or previewing, the layout of the messaging plan is also displayed.
Start Date	DateTime	7	None
Status	Picklist	30	The default, valid values for this field are: Approved, In Progress, Rejected, Released, Submitted.
Type	Text	30	The default, valid values for this field are: Product Launch and Targeted Messaging.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Messaging Plans (on page 612)

Messaging Plan Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plan items into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Messaging Plan Item Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	None
Description	Text	255	None

Default Messaging Plan Item Field Name	Data Type	Maximum Length	Comments
Disable PreLoad	Boolean	1	If the Disable PreLoad field has a value of N, which is the default value, then the preload of animations for the Oracle CRM On Demand Disconnected Mobile Sales application is enabled. A value is required for this field.
Disclosure Message	Boolean	1	None
Display Name	Text	100	None
Division	Text	50	None
Name	Text	100	None
Parent Messaging Plan	Text	30	A messaging plan is made up of a number of messaging plan items. The Parent Messaging Plan field is the messaging plan to which a messaging plan item belongs. The Parent Messaging Plan field links to the name field of a messaging plan record.
Picklist Value Group	Text	50	None
Rating	Picklist	30	None
Send Type	Picklist	30	The available values are PDF Send or Standard Send. The default value is Standard Send. The Copy Enabled check box is selected and the Optimized check is deselected by default.
Sequence Number	Number	22	None
Solution Name	Text	30	None
Speaker Notes	Text	2000	None
Status	Picklist	30	None
Synopsis	Text	2000	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Messaging Plan Items (on page 618)

Messaging Plan Item Relation Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing messaging plan item relations into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Messaging Plan Item Relation Field Name	Data Type	Maximum Length	Comments
Audience	Text	1000	None
Description	Text	255	None
Display Name	Text	100	None
Division	Text	50	None
Name	Text	100	None
Parent Messaging Plan	Text	15	None
Picklist Value Group	Text	50	None
Rating	Picklist	30	None
Sequence Number	Number	22	None
Solution Name	Text	30	None
Status	Picklist	30	None
Synopsis	Text	2000	None
Type	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)

- Importing Your Data (on page 1827)
- Messaging Plan Item Relations (on page 624)

Modification Tracking Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing modification tracking fields into Oracle CRM On Demand. This information supplements the guidelines in the topic, Field Type Guidelines for Importing Data (on page 1651). First, you must review the following information before importing modification tracking fields.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Modification Tracking Field Name	Data Type	Maximum Length	Comments
Child Object Id	Text	15	None.
Child Object Name	Text	50	None.
Event Name	Text	150	For information on event names, see About Modification Tracking Events (on page 1602).
Field Name	Text	50	None.
Object Id	Text	15	None.
Object Name	Text	50	None.
Modification Number	Number	22	None.
Modified: Date	DateTime	50	None.
Record Type	Text	50	Indicates the record type for which picklist values have been modified, for example, Account.

Related Topics

See the following topics for related information:

- Modification Tracking (on page 1589)
- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Note Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing notes into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for

Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Note Field Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Account Name	Text	255	None
Campaign External ID	Text	30	None
Campaign Name	Text	255	None
Contact External ID	Text	30	None
Contact Name	Text	255	None
Description	Text	16, 035	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Opportunity External ID	Text	30	None
Opportunity Name	Text	100	None
Private	Check box	Not applicable	None
Service Request External ID	Text	30	None
Service Request Number	Number	15	None
Subject	Text	30	Required field by default.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Objective Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing objectives into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for

Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Objective Field Name	Data Type	Maximum Length	Comments
Account Name	Text	15	The account name associated with the defined objective.
Contact Name	Text	15	The contact name associated with the defined objective.
Currency	Text	20	The currency used for the monetary values of the objective.
Description	Text	2000	The description field for the defined objective.
Division	Text	50	None
Exchange Date	Date/Time	7	The date on which the exchange rate applies to the currency.
Objective Name	Text	30	None
Objective Revenue	Text	22	Target revenue for the objective.
Objective Target	Number	22	The Objective Target field is a quantity of sales units, prescriptions, sales calls, and so on. This quantity is defined by the Objective Units field.
Objective Units	Picklist	30	The Objective Units field defines the quantity in the Objective Targets field.
Parent Objective	Text	15	If the defined objective is associated with a parent objective, this field enables both objectives to be combined.
Period	Text	15	This period value corresponds to the criteria that the user enters when setting up forecasts in Oracle CRM On Demand.
Picklist Value Group	Text	50	None

Default Objective Field Name	Data Type	Maximum Length	Comments
Plan Name	Text	15	The business plan name associated with this particular objective (optional).
Product Name	Text	15	The product name associated with the objective.
Status	Picklist	30	The status of the objective.
Target Audience	Text	2000	This is the group of individuals to which the objective is applied.
Type	Picklist	30	The type of objective. The customer sets the values.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Objectives (on page 380)

Opportunity Contact Role Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing roles for contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Contact Role Field Name	Data Type	Maximum Length	Comments
Buying Role	Picklist	39	Default valid values: User, Evaluator, Approver, Decision Maker, User and Evaluator, User and Approver, User and Decision Maker, Evaluator and Approver, Evaluator and Decision Maker, Unknown
Contact External ID	Text	30	None
Contact Name	Text	255	None
Opportunity External ID	Text	30	None

Default Contact Role Field Name	Data Type	Maximum Length	Comments
Opportunity Name	Text	100	None
Primary	Check box	Not applicable	None

Related Topics

See the following topics for related information:

- Contact Fields (on page 305)
- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Opportunity Event Fields: Import Preparation

The following table contains specific information about setting up your records before importing opportunity events into Oracle CRM On Demand. It supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Opportunity Event Field Name	Data Type	Maximum Length	Comments
Event	Text	50	Name of the event.
Event ID	ID	15	None
Event External System ID	ID	15	External system ID of event.
Opportunity	Text	50	Name of the opportunity.
Opportunity ID	ID	15	None
Opportunity External Unique ID	ID	15	External unique ID of the opportunity.
Row ID	ID	15	None

Opportunity Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunities into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Account	Text	100	Required field by default.
Account Address	Picklist	100	This value must match the Address Name field in the existing address record.
Account Address: Id	ID	15	None
Account External ID	Text	30	None
Account Location	Text	50	None
Address	Picklist	100	This value must match the Address Name field in the existing address record.
Address: Id	ID	15	None
Close Date	Date	7	Required field by default.
Dealer	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None
Expected Revenue	Currency	15	Cannot be imported. Value that is calculated based on potential revenue field multiplied by value in Probability field.
External Unique ID	Text	255	None
Forecast	Check box	Not applicable	None
Integration ID	Text	30	None
Lead Source	Picklist	30	None

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Make	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Model	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Modified By	Not applicable	Not applicable	It is not currently possible to set the value of this field during import. Its value is set automatically by the application.
Name	Text	100	None
Next Step	Text	250	None
Opportunity Currency	Picklist	15	Read-only.
Opportunity Currency	Text	20	None
Opportunity Name	Text	100	Required field by default.
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.
Owner External ID	Text	30	None
Picklist Value Group	Text	50	None
Priority	Picklist	30	Default valid values: Low, Medium, High
Probability %	Picklist	3	Default valid values: 0, 10, 20, 30, 40, 50, 60, 70, 80, 90, 100 **NOTE:** This field should always be exposed in the layout. If it is hidden, unexpected results occur.
Product Interest	Text	100	Specific to Oracle CRM On Demand Financial Services Edition.
Rating 1	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.

Default Opportunity Field Name	Data Type	Maximum Length	Comments
			For more information, see About Fields Displayed As Images (on page 56).
Rating 2	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Rating 3	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Reason Won/Lost	Picklist	30	Default valid values: Installed Base, Price, Relationship, Track Record, No Current Project, No Budget, Not Qualified, Lost to Competition, Lost to No Decision, Other
Reassign Opportunity	Check box	Not applicable	None
Revenue	Currency	15	None
Sales Stage	Picklist	50	Required field by default. This field behaves differently from most fields; it will not add picklist values that do not match even if you specify that during the import process. The import data must match the valid values for this field. If you want to capture picklist values from your CSV file that do not match the default picklist values, add them to the application before importing your data. Otherwise, the entire record is rejected. Default valid values are: Qualified Lead, Building Vision, Short List, Selected, Negotiation, Closed/Won, Closed/Lost.
Source Campaign	Picklist	30	The campaign that generated the opportunity.
Status	Picklist	30	Default valid values are Pending, Lost, and Won.
Stoplight 1	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2. For more information, see About Fields Displayed As Images (on page 56).
Stoplight 2	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Stoplight 3	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Territory	Text	50	None
Total Asset Value	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.

Default Opportunity Field Name	Data Type	Maximum Length	Comments
Total Premium	Currency	15	Specific to Oracle CRM On Demand Financial Services Edition.
Type	Picklist	30	None
Year	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.

Opportunity Team Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunity teams into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Opportunity Team Field Name	Data Type	Maximum Length	Comments
Opportunity Access	Picklist	15	This picklist is read-only. The values that you import must match the following default values exactly Read-only, Edit, Full, and No Access.
Opportunity Name	Text	100	None.
Opportunity External ID	Text	30	None.
User ID	Text	50	None.
User External ID	Text	30	None.
User Sign In ID	Text	50	None.
Team Role	Picklist	30	The default values for this field are Owner, Executive Sponsor, Consultant, Partner, and Other.
Percentage Split	Integer	22	The percentage of the revenue that is to be allocated to the team member.
Currency	Text	20	None.

Default Opportunity Team Field Name	Data Type	Maximum Length	Comments
Exchange Date	Date	None	The date on which the exchange rate applies to the currency.

Opportunity Product Revenue Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing opportunity product records into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
# of Periods	Integer	3	Recurring revenue can support a maximum of 260 periods. The length of time that is covered by the total number of periods varies based on the frequency specified (in the Frequency field. For example, if you have weekly recurring revenue you can track revenue for up to five years.
Asset Value	Currency	15	None
Contact Full Name	Text	255	None
Contract	Picklist	30	None
Description	Text	250	Limitation is 250 characters.
External Unique ID	Text	30	None
Forecast	Check box	Not applicable	None
Frequency	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Integration ID	Text	30	None

Default Opportunity Product Field Name	Data Type	Maximum Length	Comments
Opportunity External ID	Text	30	None
Opportunity Name	Picklist	30	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Owner	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Owner External ID	Text	30	None
Premium	Currency	15	None
Probability %	Picklist	22	None
Product External ID	Text	30	None
Product Name	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Purchase Date	Date	7	None
Purchase Price	Currency	15	None
Quantity	Number	15	None
Serial #	Text	100	None
Ship Date	Date	7	None
Start/Close Date	Date	7	None
Status	Text	30	None
Type	Picklist	30	None
Warranty	Picklist	30	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Order Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing orders into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Order Field Name	Data Type	Maximum Length	Comments
Order ID	Text	30	The primary key to the order object. This field is read-only.
Book	String	150	None
Book:ID	String	15	None
Order Number	Text	50	This field contains the order ID by default.
Description	Text	255	This field is the order description.
Division	Text	50	None
Owner	Varchar	15	The record owner.
Picklist Value Group	Text	50	None
Price List	Picklist	50	This picklist is read-only. The default values for this picklist are the names of the price lists.
Opportunity	Text	15	None.
Account	Text	15	None.
Final Account	Text	15	This field is used when the Ebiz PIP Integration value is selected for the Order Usage setting in the company profile. Ebiz PIP Integration is the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution, and therefore this field is not available to Oracle CRM On Demand Order Management. For more information on Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite, contact Customer Care.

Default Order Field Name	Data Type	Maximum Length	Comments
Activity	Text	15	None.
Contact	Text	15	None.
Shipping Address	Text	15	The address to which the order is shipped.
Billing Address	Text	15	The address to which the order is billed.
Order Creation Status	Picklist	30	The status code for the order. For more information on this field, see Order Fields (on page 641).
Order Integration Message	Text	255	This field is populated only when the Ebiz PIP Integration value is selected for the Order Usage setting in the company profile. Ebiz PIP Integration is the Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite integration solution, and therefore this field is not available to Oracle CRM On Demand Order Management. For more information on Oracle Lead to Order Integration Pack for Oracle CRM On Demand and Oracle E-Business Suite, contact Customer Care.

Order Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing order items into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Order Item Field Name	Data Type	Maximum Length	Comments
Product	Text	15	This field contains the foreign key for the product ID. It is a required field.
Order	Text	15	This field contains the foreign key for the order ID. It is a required field.
Order Item Number	Text	15	This field contains the object's primary key by default.
Quantity	Number	22	This field contains the quantity of products ordered. It is a required field.

Default Order Item Field Name	Data Type	Maximum Length	Comments
Item Price	Number	22	None.
Discount Amount	Number	22	None.
Discount Percentage	Number	22	None.
Price After Discount	Number	22	None.

Partner Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing partners into Oracle CRM On Demand. This information supplements the guidelines in the topic, Field Type Guidelines for Importing Data (on page 1651). First, you must review the following information before importing partners.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Partner Field Name	Data Type	Maximum Length	Comments
# Physicians	Number	22	This is specific to Oracle CRM On Demand Life Sciences Edition.
Account Partner	Check box	1	None
Annual Revenues	Currency	15	None
Billing Address	Picklist	100	This field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Billing Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Billing Address 2	Text	100	This field is not available if shared addresses are set up for your company.

Default Partner Field Name	Data Type	Maximum Length	Comments
Billing Address 3	Text	100	This field is not available if shared addresses are set up for your company.
Billing City	Text	50	This field is not available if shared addresses are set up for your company.
Billing Country	Picklist	30	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Billing PO /Sorting Code	Text	30	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Billing Province	Text	50	If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. State to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 1615)).
Billing US State	Picklist	2	The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data. This field is not available if shared addresses are set up for your company.
Billing ZIP/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Bill To Address External ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing Address record. Also, if the Validate Shared Addresses setting is

Default Partner Field Name	Data Type	Maximum Length	Comments
			enabled, then this value must match an existing validated address record.
Call Frequency	Picklist	30	This field is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Channel Account Manager	Text	50	None
Compliance Review Date	UTC Date Time	7	This is the date that the Compliance Status is due for review.
Compliance Status	Picklist	30	You can edit this picklist.
Description	Text	255	None
Division	Text	50	None
Expertise	Text	30	You can edit this picklist.
External Unique ID	Text	30	None.
Furigana Name	Text	100	None.
HIN	Text	30	Health Industry Number (HIN).
Industry	Picklist	50	This picklist is read-only. The default values for this picklist are: Automotive, Energy, Financial Services, High Technology, Manufacturing, Other, Pharmaceuticals, Retail, Services, and Telecommunications.
Influence Type	Picklist	30	You can edit this picklist.
Last Assignment Completion Date	UTC Date Time	7	None
Last Assignment Submission Date	UTC Date Time	7	None
Last Call Date	UTC Date Time	7	None
Location	Text	50	None
Main Fax #	Phone	40	None

Default Partner Field Name	Data Type	Maximum Length	Comments
Main Phone #	Phone	40	None
Market Potential	Picklist	30	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Segment	Picklist	30	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist.
Market Share	Number	Not applicable	This is specific to Oracle CRM On Demand Life Sciences Edition. You can edit this picklist. This number is between zero (0) and 100.
Maximum Number of Users	Integer	Not applicable	None
Number of Employees	Integer	22	None
Originating Partner Account	Picklist	100	This picklist is read-only. This picklist contains the value of the valid partner.
Owner	Text	50	This field contains the name of the current owner of this record.
Owner Partner Account	Picklist	100	This picklist is read-only.
Partner Currency	Picklist	15	This picklist is read-only. This value must match the existing value for the current partner currency.
Partner Level	Picklist	30	You can edit this picklist.
Partner Name	Text	100	This is the partner's name.
Partner Organization Status	Picklist	30	This field indicates if the partner is an active or an inactive Partner Relationship Partner (PRM) organization. When this is set to active, a book is automatically created for the partner organization. Their users are automatically added to the book. This book is only used when relating partners to each other in the Partner Relationship Related Item under the Partner Record field. You can edit this picklist.

Default Partner Field Name	Data Type	Maximum Length	Comments
Picklist Value Group	Text	50	None
Price List	Picklist	50	This picklist is read-only. The default values for this picklist are the names of the price lists.
Primary Partner Type	Picklist	30	This picklist is read-only. The default values in this picklist are the partner types associated with the partner.
Principal Partner Account	Picklist	100	This picklist is read-only. The default value for this picklist is the value of the partner.
Priority	Picklist	30	You can edit this picklist.
Public Company	Check Box	Not applicable	None.
Ranking	Number	22	None.
Reassign Account	Check box	Not applicable	This field indicates that the account should be reassigned. When imported, triggers automatic assignment rules for this account record, if your company administrator or manager has set that feature up.
Reference	Check Box	Not applicable	This field should be set to the checked state if this account agreed to be a reference that you can give out to prospects.
Reference as of	Date	Not applicable	None
Region	Picklist	25	You can edit this picklist. The default valid values are East, West, and Central.
Route	Picklist	30	You can edit this picklist.
Shipping Address	Picklist	100	This field is available only if shared addresses are set up for your company. This value must match the Address Name field in the existing Address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.

Default Partner Field Name	Data Type	Maximum Length	Comments
Shipping Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Shipping Address 2	Text	100	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Shipping Address 3	Text	50	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (on page 1615). This field is not available if shared addresses are set up for your company.
Shipping City	Text	50	This field is not available if shared addresses are set up for your company.
Shipping Country	Picklist	30	The default valid values are the names of all the countries in the world. The valid value for the U.S. is *USA.* Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Shipping PO Box/Sorting Code	Text	30	If your file contains non-U.S. addresses, then map the following address items to this field: Colonia/Section, CEDEX Code, Address 4, URB, and Township (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.

Default Partner Field Name	Data Type	Maximum Length	Comments
Shipping Province	Text	50	If your file contains non-U.S. addresses, then map the following address items or their equivalents to the U.S. state to this field: MEX State, BRA State, Parish, Part of Territory, Island, Prefecture, Region, Emirate, and Oblast (see About Countries and Address Mapping (on page 1615)). This field is not available if shared addresses are set up for your company.
Shipping US State	Picklist	2	The default valid values are standard two-letter abbreviations for all the U.S. states (all capital letters). Oracle CRM On Demand does not allow the modification of the valid values for this field. Make sure the import data matches the valid values for this field before importing data. This field is not available if shared addresses are set up for your company.
Shipping ZIP/Post Code	Text	30	This field is not available if shared addresses are set up for your company.
Shipping To Address External ID	Text	30	If shared addresses are enabled for your company, then the data type for this field becomes a picklist. The value for this field must match the External Unique Id of an existing address record. Also, if the Validate Shared Addresses setting is enabled, then this value must match an existing validated address record.
Source Campaign	Picklist	100	This picklist is read-only. The default value for this picklist is the name of the source campaign that generated the account.
Status	Picklist	30	You can edit this picklist.
Territory	Picklist	50	This picklist is read-only. The default field in this picklist is the name of the territory.
Web Site	Text	100	None.
YTD Revenue	Currency	22	This is specific to Oracle CRM On Demand Life Sciences Edition. This stands for Year To Date.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Partner Program Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing partner programs into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Partner Program Field Name	Data Type	Maximum Length	Comments
Begin Date	Date/Time	7	None
Deal Registration Allowed	Checkbox	Not applicable	None
Description	Text	16, 350	None
End Date	Date/Time	7	None
MDF Allowed	Checkbox	Not applicable	None
Owner Full Name	Picklist	30	None
Partner Program Name	Text	30	None
Partner Type	Picklist	30	None
Program Type	Picklist	30	None
Special Pricing Allowed	Checkbox	Not applicable	None
Status	Picklist	30	None

Plan Account Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Plan Account Field Name	Data Type	Maximum Length	Comments
Account	Picklist	15	The reference field for holding the Account Object ID.
Business Plan	Picklist	15	The reference field for holding the Business Plan Object ID.
Division	Text	50	None
Picklist Value Group	Text	50	None
Primary Plan Account	Boolean	1	Indicates whether the account is a primary account.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Plan Accounts (on page 384)

Plan Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan contacts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Plan Contacts Field Name	Data Type	Maximum Length	Comments
Business Plan	Picklist	15	The reference field holding the Business Plan Object ID.
Contact	Picklist	15	The reference field holding the Contact Object ID.
Division	Text	50	None

Default Plan Contacts Field Name	Data Type	Maximum Length	Comments
Picklist Value Group	Text	50	None
Primary Plan Contact	Boolean	1	Indicates whether the contact is the primary contact.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Plan Contacts (on page 387)

Plan Opportunity Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing plan opportunities into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Plan Opportunity Field Name	Data Type	Maximum Length	Comments
Division	Text	50	None
Picklist Value Group	Text	50	None
Opportunity	Text	15	The reference field for holding the Opportunity Object ID.
Business Plan	Text	15	The reference field for holding the Business Plan Object ID.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Plan Opportunities (on page 390)

Policy Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing policies in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for

Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for policy data only.

Policy Field Name	Data Type	Maximum Length	Comments
Billing Status	Picklist	30	None
Business Account	Text	15	None
Business Account: External System ID	Text	30	None
Campaign	Text	15	None
Campaign: External System ID	Text	30	None
Cancelled Date	Date	Not applicable	None
Company: External System ID	Text	30	None
Currency Code	Picklist	20	None
Division	Text	50	None
Effective Date	Date	Not applicable	None
Expiration Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Face Amount	Currency	22	None
Financial Account	Text	15	None

Policy Field Name	Data Type	Maximum Length	Comments
Financial Account: External System ID	Text	30	None
Household	Text	15	None
Household: External System ID	Text	30	None
Integration ID	Text	30	None
Invoice Due Date	Date	Not applicable	None
Owner: External System ID	Text	30	None
Parent Policy	Text	15	None
Parent Policy: External System ID	Text	50	The external unique ID of the parent policy linked to this record.
Picklist Value Group	Text	50	None
Policy Number	Text	50	The predefined field for the matching record. This field is also known as the policy number field.
Policy Pay Method	Picklist	30	None
Policy Type	Picklist	30	None
Primary Agency	Text	15	None
Primary Agency: External System ID	Text	30	The external unique ID of the primary agency (business account is set to partner) linked to this record.
Primary Agent	Text	15	None

Policy Field Name	Data Type	Maximum Length	Comments
Primary Agent: External System ID	Text	30	The external unique ID of the primary agent (contact) linked to this record.
Producer Code	Text	50	None
Rate Plan	Picklist	30	None
Rate State	Picklist	30	None
Referral Source	Picklist	30	None
Status	Picklist	30	None
Sub Status	Picklist	30	None
Term	Text	50	None
Total Premium	Currency	22	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Policy Holder Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing policy holders in to Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field. This topic is specific to Oracle CRM On Demand Financial Services Edition.

The information in the following table is valid for policy holder data only.

Default Policy Holder Field Name	Data Type	Maximum Length	Comments
Business Account Holder	Text	15	None
Business Account Holder: External System ID	Text	30	None

Default Policy Holder Field Name	Data Type	Maximum Length	Comments
Company: External System ID	Text	50	None
Contact Holder	Text	15	None
Contact Holder: External Unique ID	Text	50	None
Currency Code	Picklist	20	None
Division	Text	50	None
Exchange Date	Date	Not applicable	None
External System ID	Text	50	None
External Last Updated	Date/Time	Not applicable	None
External Source	Text	50	None
Household Holder	Text	15	None
Household Holder: External System ID	Text	30	None
Holder Percentage	Percent	22	None
Insured Type	Picklist	30	None
Integration ID	Text	30	None
Owner: External System ID	Text	30	None
Picklist Value Group	Text	50	None
Policy	Text	15	The predefined fields for the matching record
Policy: External System ID	Text	50	The external unique ID of the policy linked to this record

Default Policy Holder Field Name	Data Type	Maximum Length	Comments
Policy Holder Name	Text	250	The predefined fields for the matching record
Role	Picklist	30	The predefined fields for the matching record

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Portfolio Fields: Import Preparation

NOTE: This feature might not be available in your version of the application since it is not part of the standard application.

The following table contains specific information about setting up your CSV file before importing the portfolio accounts into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Account Currency	Picklist	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Account Number	Text	100	None
Account Type	Picklist	30	Default valid values: Annuity Contract, Group Policy, 401K, Checking, IRA, Life Insurance, Mutual Fund, Savings, and Other.
Annual % Rate	Number	15	None
Cancelled/Sold Date	Date	7	None

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Credit Limit	Currency	20	None
Division	Text	50	None
Effective Date	Date	7	None
Expiration Date	Date	7	None
External Unique ID	Text	30	None
Face Value	Currency	20	None
Institution	Text	100	None
Institution Location	Text	50	None
Loan Amount	Currency	20	None
Maturity	Date	7	None
Picklist Value Group	Text	50	None
Premium	Currency	20	None
Primary Owner ID	Text	50	None
Product	Text	50	None
Purchase Date	Date	7	None
Revenue	Currency	20	None
Risk Class	Text	50	None
Status	Picklist	30	Default valid values: Active, Pending, Quote, Terminated, and Closed.
Term	Number	20	None
Term Unit	Picklist	20	Default valid values: Day, Week, Month, and Year.
Total Asset Value	Currency	20	None

Default Portfolio Account Field Name	Data Type	Maximum Length	Comments
Valuation Date	Date	7	None
Institution External ID	Text	30	Institution links to account.
Product External ID	Text	30	None

Related Topics

See the following topics for related information:

- Portfolios (on page 655)
- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Price List Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing price lists into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Price List Field Name	Data Type	Maximum Length	Comments
Currency	Varchar	20	The currency of the price list.
Description	Varchar	255	None
Effective From	UTC DateTime	7	The date from which the price list is effective.
Effective To	UTC DateTime	7	The date to which the price list is effective.
Owner	Varchar	15	The owner of the record.
Price List Name	Varchar	50	None
Status	Varchar	30	The current status of the price list, for example, In Progress, Published, and so on.

Default Price List Field Name	Data Type	Maximum Length	Comments
Type	Varchar	30	The type of price list.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Price List Line Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing price list line items into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Price List Line Item Field Name	Data Type	Maximum Length	Comments
Description	Varchar	255	None
Effective From	UTC DateTime	7	The date from which the price list is effective.
Effective To	UTC DateTime	7	The date to which the price list is effective.
List Price	Number	22	The price of the product.
Owner	Varchar	15	The owner of the record.
Price List	Varchar	15	The name of the price list with which this line item is associated.
Price Type	Varchar	30	The type of price on the line item, for example, standard.
Product	Varchar	15	The product of the price line item.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Product Category Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing product category fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Campaign Recipients Field Name	Data Type	Maximum Length
Category Name	Text	100
Parent Category	Text	100
External Unique ID	Text	30
Parent Product Category External ID	Text	30
Description	Text	16,350

Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing products into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Product Field Name	Data Type	Maximum Length	Comments
Body	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition. Default valid values: Coupe, Salon, Cabriolet, Hatchback, Wagon, Sedan
Category	Picklist	30	Default valid values: Clothing, Tractor, SUV, Interior, Heavy Truck, Exterior, Electrical, DriveTrain, Light Truck, Passenger Car

Default Product Field Name	Data Type	Maximum Length	Comments
Controlled	Check box	Not applicable	None
Dealer Invoice Price	Currency	15	Specific to Oracle CRM On Demand Automotive Edition.
Description	Text	255	None
Division	Text	50	None
Door	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition. Default valid values: 3 Door, 2 Door, 4 Door
Engine	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Lot # Tracking	Check box	Not applicable	None
Make	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Model	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Orderable	Check box	Not applicable	None
Parent Product	Text	100	None
Part #	Text	50	None
Picklist Value Group	Text	50	None
Price Type	Picklist	30	None
Product Category	Text	100	None
Product Currency	Currency	15	None
Product Name	Text	100	Required field by default.
Product Type	Picklist	30	None

Default Product Field Name	Data Type	Maximum Length	Comments
Revision	Picklist	30	None
Serialized	Check box	Not applicable	None
Status	Picklist	30	None
Sub Type	Picklist	30	None
Therapeutic Class	Picklist	30	Specific to Oracle CRM On Demand Life Sciences Edition.
Transmission	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Trim	Picklist	30	Specific to Oracle CRM On Demand Automotive Edition.
Type	Picklist	30	None
Year	Number	50	Specific to Oracle CRM On Demand Automotive Edition.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Product Indication Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing products into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your company administrator to determine the new name for the field.

Default Product Indication Field Name	Data Type	Maximum Length	Comments
Division	Text	50	None
Picklist Value Group	Text	50	None

Default Product Indication Field Name	Data Type	Maximum Length	Comments
Product Indication Name	Text	50	Must be unique in a company.
Product ID	Reference	Not Applicable	The product lookup at the Brand level.
Product Name	Reference	Not Applicable	The product name lookup at the Brand level.
Product Category	Reference	Not Applicable	Read-only text. This name displays the product category of the selected product brand.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Sample Disclaimer Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample disclaimers into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Disclaimer Field Name	Data Type	Maximum Length	Comments
Comments	Text	255	This field provides supplementary information on the disclaimer field.
Country	Picklist	30	The country to which the disclaimer is targeted.
Number	Text	15	None.
Division	Text	50	None.
Picklist Value Group	Text	50	None.
Default Language	Picklist	30	The default language for the related disclaimer record.

Default Sample Disclaimer Field Name	Data Type	Maximum Length	Comments
Disclaimer Text	Text	1000	This is the disclaimer text.
End Date	Date/Time	7	The disclaimer expiration date.
Start Date	Date/Time	7	The disclaimer activation date.
Status	Picklist	30	The values for this field are: Active, Inactive, and Expired.
Type	Picklist	30	This value indicates if the disclaimer is global or multilingual.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Sample Inventory Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample inventories into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Inventory Field Name	Data Type	Maximum Length	Comments
Audit ReportID	Text	15	None
Division	Text	50	None
Inventory Period	Text	15	The reference field pointing to the Inventory Period Object ID.
Last Physical Count	Number	22	None
Lot#	Text	15	None
Opening Balance	Number	22	None
Physical Count	Number	22	None

Default Sample Inventory Field Name	Data Type	Maximum Length	Comments
Picklist Value Group	Text	50	None
Sample	Text	15	The reference field pointing to the sample product of this inventory.
System Count	Number	22	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Sample Inventory (on page 543)

Sample Lot Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample lots into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Lot Field Name	Data Type	Maximum Length	Comments
CutOff Date	Text	255	The text version of the CutOff_Date field.
Cutoff_Date	Date	10	This date is calculated. The calculation is based on the expiration date minus the value provide in the Short Days field. of the short days. For example, if the expiration date is January 31, and if the value in the Short Days field is 30, then the value in the Cutoff_Date field is January 1. This date indicates that the sample lot must be used in the immediate future or returned to the head office.
Description	Text	255	The lot description.
Division	Text	50	None
Expiration Date	Date	7	The expiration date of the sample lot.

Default Sample Lot Field Name	Data Type	Maximum Length	Comments
Inventory By Lot	Boolean	1	This field indicates whether the inventory is tracked at the lot level or product level.
Lot#	Text	100	The lot name.
Orderable	Boolean	1	This field indicates whether the lot can be ordered.
Picklist Value Group	Text	50	None
Product Level	Number	22	None
Sample	Text	15	The product name.
Short Days	Number	22	The number of lead days.
Start Date	Date	7	The sample lot start date.
UoM	Text	30	The unit of measure.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)
- Sample Lots (on page 593)

Sample Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following information before importing data.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Request Field Name	Data Type	Maximum Length	Comments
Account	Text	15	None.
Account: External Unique ID	Text	30	The unique external ID of the parent account record to which the sample request is linked.

Default Sample Request Field Name	Data Type	Maximum Length	Comments
Book	String	150	None
Book:ID	String	15	None
Billing Address	Text	15	The address to which the order is billed.
Contact	Text	15	This field is required.
Contact: External Unique ID	Text	30	The unique external ID of the parent contact record to which the sample request is linked.
Currency	Picklist	15	The values in this picklist are read-only. The values that you import must match the valid values in this picklist.
Description	Text	255	This field contains the description of the sample request record.
Division	Text	50	None
Exchange Date	Date	Not applicable	None
External Flag	Text	1	The values for this field are: Y and N. If the external flag has a value of Y, then it indicates that the sample request is created by an external system.
External Unique ID	Text	30	None.
Id	Text	15	This field is the sample request identifier.
Order Created	UTC Date Time	7	The date and time when the order was created.
Order Integration Message	Text	255	None.
Order Number	Text	50	The default value of this field is the order ID.
Owner	Text	15	This field displays the record owner.
Owner: External Unique ID	Text	30	The unique external ID of the parent owner record to which the sample request is linked.

Default Sample Request Field Name	Data Type	Maximum Length	Comments
Picklist Value Group	Text	50	None
Shipping Address	Text	15	The address to which the order is shipped. This field is required.
Shipping Address Id	Text	15	The ID field of the shipping address.
Status	Picklist	30	The status code for the sample request.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Sample Request Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample request items into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following information before importing data.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Request Items Field Name	Data Type	Maximum Length	Comments
Contact: External Unique ID	Text	30	None.
Currency	Picklist	15	The values in this picklist are read-only. The values that you import must match the valid values in this picklist.
Discount Amount	Number	22	None.
Discount Percent	Number	22	None.
Division	Text	50	None.
Id	Text	15	This field is the sample request item identifier.
Order	Text	15	This field contains the Sample Request ID. This field is required.

Default Sample Request Items Field Name	Data Type	Maximum Length	Comments
Order Item Number	Text	15	This field contains the Sample Request Item ID.
Owner: External Unique ID	Text	30	The unique external ID of the parent sample request record to which the sample request item is linked.
Picklist Value Item	Text	50	None.
Price	Number	22	None.
Price After Discount	Number	22	None.
Product	Text	15	This field contains the foreign key for the product ID. It is a required field.
Product: External Unique ID	Text	30	The unique external ID of the parent product record to which the sample request item is linked.
Quantity	Number	22	This field contains the quantity of products ordered. It is a required field, and the value must be greater than zero. **NOTE:** If a Sample Request Allocation record type is defined, then the value in the Quantity field is validated against its corresponding Allocation Qty, Max Qty and Max Qty per Customer fields. If this validation fails, then you cannot import the Sample Request Item record type into Oracle CRM On Demand.
Status	Picklist	30	The status code for the sample request item.

NOTE: If a product is blocked for a contact, then you cannot import a sample request item for that product for the contact. If you attempt to do so, then the record is not imported, and an error message is recorded in the log file for the import request. For more information about blocking products for contacts, see Blocked Products (on page 643).

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Sample Transaction Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing sample transactions into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

If you want to use a workflow action to automatically submit a number of sample transactions during import, then use a custom field, for example, set Mark for Submit to Y, to indicate that the sample transactions are ready to be submitted after the import completes. For more information on using the submit workflow action to submit sample transactions, see Setting Up the Automatic Submission of Sample Transactions (on page 1882).

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Sample Transaction Field Name	Data Type	Maximum Length	Comments
# of Packages Sent	Number	22	The number of packages being sent when sample transactions are transferred out.
# of Packages Received	Number	22	The number of packages that were received when sample transactions were transferred in.
Adjustment Reason	Picklist	30	The default values for this field are: Human Error, Theft, Initial Count, Lost, Found and Request.
Comments	Text	255	The description field.
Date	Date/Time	7	The date of the transaction.
Division	Text	50	None
Expected Arrival Date	Date/Time	7	None
Expected Delivery Date	Date/Time	7	None
From Transaction	Text	15	None
Inventory Period: Start Date	Date/Time	7	None
Inventory Period: End Date	Date/Time	7	None
Invoice #	Text	15	None

Default Sample Transaction Field Name	Data Type	Maximum Length	Comments
Name	Text	50	None
ParentTxn	Text	15	None
Picklist Value Group	Text	50	None
Received Date	Date/Time	7	None
Root Transaction	Text	15	None
Status	Picklist	30	The default values are: In Progress, In Transit, Adjusted, Processed, and Processed with Discrepancies.
Sent Date	Date/Time	7	None
Tracking #	Text	15	None
Transfer To	Text	15	None
Type	Picklist	30	The default values are: Transfer In, Transfer Out, Sample Lost, Inventory Adjustment, and Disbursement.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Service Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing service requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Service Request Field Name	Data Type	Maximum Length	Comments
Account	Text	100	None

Default Service Request Field Name	Data Type	Maximum Length	Comments
Account External ID	Text	30	None
Area	Picklist	30	Default valid values: Product, Installation, Maintenance, Training, and Other
Cause	Picklist	30	Default valid values: Unclear Instructions, User Needs Training, Existing Issue, New Issue, Other
Closed	Time	Date/Time	None
Contact	Text	255	None
Contact External ID	Text	30	None
Dealer	Picklist	100	Oracle CRM On Demand Automotive Edition
Description	Text	16,350	If a Description field in the import file exceeds 16,350 characters, it is truncated to 16,252 characters. The remaining characters are added to the linked Notes, each with a maximum limit of 16,350 characters.
Division	Text	50	None
External Unique ID	Text	30	None
Opened Time	Date/Time	7	None
Opportunity	Text	100	None
Owner	Email	50	File data must match the Sign On User ID for an existing Oracle CRM On Demand user. If a record does not contain a valid value for this field (including no value), its value is set to the Sign On User ID of the user performing the import. If this field is not mapped to a valid import file field when running the Import Assistant, the Owner is set to the Sign On User ID of the user performing the import for all of the imported records.

Default Service Request Field Name	Data Type	Maximum Length	Comments
Owner External ID	Text	30	None
Picklist Value Group	Text	50	None
Principal Partner Account	Varchar	15	None
Priority	Picklist	30	Default valid values: 1-ASAP, 2-High, 3-Medium, 4-Low
Product	Picklist	100	None
Reassign Owner	Check box	Not applicable	None
Servicing Dealer	Text	70	Oracle CRM On Demand Automotive Edition
Source	Picklist	30	Default valid values: Phone, Web, Email, Fax
SR Currency	Text	20	None
SR Number	Text	64	None
Status	Picklist	30	Default valid values: Open, Pending, Closed, Open - Escalated, Cancelled
Subject	Text	250	None
Type	Picklist	30	Default valid values: Question, Issue, Enhancement Request, Other
Vehicle	Text	100	None

Related Topics

See the following topics for related information:

- Service Request Fields (on page 401)
- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Signature Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing signatures into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do

not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Signature Field Name	Data Type	Maximum Length	Comments
Activity ID	Text	15	None
Contact First Name	Text	50	None
Contact Last Name	Text	50	None
Disclaimer Text	Text	500	None
Header Text	Text	800	None
Sales Rep First Name	Text	50	None
Sales Rep Last Name	Text	50	None
Signature Control	Text	16000	This field holds the signature x and y coordinates.
Signature Date	Date	7	None

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Social Profile Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing social profiles into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). You must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Social Profile Field Name	Data Type	Maximum Length	Comments
Community	Text	255	The name of the social media site, such as Facebook or Twitter, where the contact was observed.
Currency	Picklist	15	None.

Default Social Profile Field Name	Data Type	Maximum Length	Comments
Exchange Date	Date	Not applicable	None.
Author Link	URL	255	A Web link to the user's profile page for that social media type. It opens a new window.
Author	Text	100	The unique user name of the contact on the social media site.
Active	Boolean	1	Indicates whether the social media profile is active. The default value is true (1).

Solution Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing solutions into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Solution Field Name	Data Type	Maximum Length	Comments
Division	Text	50	None
External Unique ID	Text	30	None
FAQ	Text	250	None
Integration ID	Text	30	None
Picklist Value Group	Text	50	None
Product Category	Picklist	100	None
Published	Picklist	1	Default valid values are Y and N. These values must be in English, regardless of your language settings.
Rating 1	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5. For more information, see About Fields Displayed As Images (on page 56).

Default Solution Field Name	Data Type	Maximum Length	Comments
Rating 2	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Rating 3	Integer	Not applicable	Valid values for this field are: null, 1, 2, 3, 4, 5.
Service Request Count	Integer	22	None
Solution Currency	Picklist	20	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Solution Details	Text	16,000	None
Solution Rating	Number	15	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Status	Picklist	30	Default valid values: Draft, Approved, Obsolete
Stoplight 1	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2. For more information, see About Fields Displayed As Images (on page 56).
Stoplight 2	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Stoplight 3	Integer	Not applicable	Valid values for this field are: null, 0, 1, 2.
Title	Text	100	Required field by default.

Related Topics

See the following topics for related information:

- Solution Fields (on page 409)
- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Special Pricing Product Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing special pricing products into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do

not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Special Pricing Product Field Name	Data Type	Maximum Length	Comments
Authorized Cost	Number	22	The partner's price that is under negotiation for the special pricing request.
Competitor Name	Varchar	100	The name of the competitor for the request.
Competitor Partner	Varchar	100	The name of the competing partner.
Competitor Product	Varchar	100	The name of the competitor's product.
Competitor Product Price	Number	22	The price of the competitor's product.
Currency	Varchar	20	None
Description	Varchar	250	None
MSRP	Number	22	The manufacturer's suggested retail price (MSRP) in the currency used.
Other Competitive Information	Varchar	250	Any other information regarding competitive product offerings, for example, special price justification, and so on.
Product	Varchar	15	The name of the product for the special pricing request.
Purchase Cost	Number	22	The price that the partner originally paid to purchase the product.
Quantity	Number	22	The expected quantity of products that will be sold under this request.
Requested Cost	Number	22	The reduced price that the partner requested.
Requested Resale Price	Number	22	The resale price at which the partner wanted to sell the product.
SP Request	Varchar	15	The special pricing request that this special pricing product is associated with.
Suggested Resale Price	Number	22	The resale price suggested by the brand owner.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Special Pricing Request Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing special pricing requests into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Special Pricing Request Field Name	Data Type	Maximum Length	Comments
Approval Status	Varchar	30	The approval status for the special pricing request.
Approver	Varchar	15	The name of the approver.
Authorized Date	UTC Date Time	7	The date and time when the special pricing request was approved.
Claim Decision Date	Date	7	The date on which a decision was made for the claim.
Claim Status	Date	7	The status of the special pricing claim.
Currency	Varchar	20	The currency of the special pricing request.
Deal Registration	Varchar	15	The deal registration that is associated with the special pricing request.
Description	Varchar	15	None
Due Date	Date	7	The date by which the request must be processed.
End Customer	Varchar	15	The customer for the request. If the request is associated with an opportunity, then you can select opportunity account.
End Date	UTC Date	7	The date and time after which the special pricing is no longer effective.

Default Special Pricing Request Field Name	Data Type	Maximum Length	Comments
Fund	Varchar	15	The name of the fund associated with the special pricing request.
Last Approved By	Varchar	15	The name of the person who most recently approved the request.
Opportunity	Varchar	15	The opportunity to which the request is related.
Originating Partner Account	Varchar	15	The partner who originated the special pricing request.
Owner	Varchar	15	The record owner.
Owner Partner Account	Varchar	15	The partner account for which the owner works.
Partner Program	Varchar	15	The partner program with which the request is associated.
Principal Partner Account	Varchar	15	The partner company that is leading the effort on the special pricing request.
Reason Code	Varchar	30	The reason why a special pricing request was returned or rejected.
Request Date	Date	7	The date and time that the special pricing request was created.
Request Name	Varchar	50	The name of the request.
Start Date	UTC Date Time	7	The date and time from which the special pricing starts.
Submission Status	Varchar	30	The status of the submission, such as Not Submitted, Submitted, or Recalled.
Submitted Date	UTC Date Time	7	The date and time that the request was submitted.
Total Amount Authorized	Number	22	The total amount that is being authorized.
Total Amount Requested	Number	22	The total amount that was requested by the partner.

Default Special Pricing Request Field Name	Data Type	Maximum Length	Comments
Total Claim Amount Approved	Number	22	The total claim amount that was approved for the partner.
Total Claim Amount Req.	Number	22	The total claim amount that is requested by the partner.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Task Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a contact and a task into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Task Contact Field Name	Data Type	Maximum Length
Contact Full Name	Text	60
Contact External ID	Text	30
Task External ID	Text	30

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Task User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing the link between a user and a task into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do

not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Task User Field Name	Data Type	Maximum Length
User ID	Text	50
Task External ID	Text	30
User External ID	Text	30

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

Transaction Item Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing transaction items into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Transaction Item Field Name	Data Type	Maximum Length	Comments
Description	Text	250	The transaction item description.
Inventory Period	Text	15	None
Line Number	Number	22	The unique number associated with the transaction header record.
Lot#	Text	15	The reference field for holding the Sample Lot ID.
Quantity	Number	22	The number of samples associated with the transaction item.
Sample	Text	15	The name of the sample that is provided with the transaction item. You must document all samples.
Shipped Quantity	Number	22	The number of samples that were shipped as a transaction item.

Default Transaction Item Field Name	Data Type	Maximum Length	Comments
Transaction#	Text	15	The reference field for holding the Sample Transaction ID.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)
- Importing Your Data (on page 1827)

User Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing users into Oracle CRM On Demand.

NOTE: To import user records, your role must include the Manage Users privilege.

This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default User Field Name	Data Type	Maximum Length	Comments
Alias	Text	50	Required field by default.
User Address 1	Text	200	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (see About Countries and Address Mapping on page 1615).
User Address 2, 3	Text	100	For a description of how to map address fields on a country-by-country basis, see About Countries and Address Mapping (see About Countries and Address Mapping on page 1615).
User City	Text	50	None

Default User Field Name	Data Type	Maximum Length	Comments
User Country	Picklist	30	Default valid values are the names of all the countries in the world. The valid value for the U.S. is USA. The application does not allow modification of valid values for this field. Make sure the import data matches the valid values for this field before import (see About Countries and Address Mapping (on page 1615)).
User PO Box/Sorting Code	Text	30	None
User Province	Text	50	For Canada, see About Countries and Address Mapping (on page 1615). However, this is not a picklist field.
User US State	Picklist	2	For the list of valid US state values, see About Countries and Address Mapping (on page 1615).
User Zip/Post Code	Text	30	None
Cellular Phone #	Phone	40	None
Currency	Text	50	This field is set at the company level, and, consequently, you cannot import this field or edit its picklist values.
Department	Text	75	None
Division	Text	75	None
Email	Text	50	Required field by default.
Email Temporary Password When I Click Save	Check box	Not applicable	If you select this check box and save, an email with a temporary password is sent to the user.
Employee Number	Number	30	None
External Unique ID	Text	30	Contains the External ID of the imported record.
First Name	Text	50	Required field by default.
Fund Approval Limit	Number	22	Specific to Oracle CRM On Demand High Tech Edition and Oracle CRM On Demand Partner Relationship Management Edition.

Default User Field Name	Data Type	Maximum Length	Comments
Integration ID	Text	30	Identifier used for integrating with external systems.
Language	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the standard valid values.
Last Name	Text	50	Required field by default.
Locale	Text	50	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Middle Name	Text	50	None
Mr./Ms.	Picklist	30	None
Preserve Default Book	Check box	Not applicable	For more information on the Preserve Default Book field, see User Fields (on page 1365).
Reports To	Text	Not applicable	This is a calculated field, based on the manager's first and last name.
Reports To External ID	Text	30	None
Role	Picklist	50	Required field by default. Default valid values: Administrator, Executive, Field Sales Rep, Inside Sales Rep, Sales & Marketing Manager, Service Manager, Service Rep.
Status	Picklist	30	Required field by default. Default valid values: Active, Inactive.
Time Zone	Text and number	100	You are not able to edit this picklist. Therefore, the values you import must exactly match the valid values.
Work Fax #	Phone	40	None
Work Phone #	Phone	40	Required field by default.

Related Topics

See the following topics for related information:

- Field Type Guidelines for Importing Data (on page 1651)

- Importing Your Data (on page 1827)
- User Fields (on page 1365)

Vehicle Contact Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing vehicle contact fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

Default Product Category Field Name	Data Type	Maximum Length
Serial Number	Text	100
Product Name	Text	100
Contact Full Name	Text	60
Contact External ID	Text	30
Vehicle External ID	Text	30
Primary	Check box	Not applicable

Vehicle Fields: Import Preparation

The following table contains specific information about setting up your CSV file before importing vehicle fields into Oracle CRM On Demand. This information supplements the guidelines given in the topic Field Type Guidelines for Importing Data (on page 1651). First, you must review the following import information before performing an import.

NOTE: The Default Field column in this table contains only the initial (default) name for each field. It does not contain any names that have been changed for your company in Oracle CRM On Demand. Therefore, if you do not see a specific field when you try to import your data, check with your administrator to determine the new name for the field.

NOTE: This section is specific to Oracle CRM On Demand Automotive Edition.

Default Vehicle Field Name	Data Type	Maximum Length
Division	Text	50
Picklist Value Group	Text	50
VIN	Text	100

Default Vehicle Field Name	Data Type	Maximum Length
Make	Text	30
Model	Text	30
Year	Text	22
Trim	Text	30
Door	Text	30
Exterior Color	Text	30
External Unique ID	Text	30
Owner External ID	Text	30
Account External ID	Text	30
Product External ID	Text	30
Selling Dealer External ID	Text	30
Service Dealer External ID	Text	30
Product Type	Text	30
Selling Dealer	Text	100
Status	Text	255
Account	Text	100
Account Type	Text	255
Contact	Text	255
License Number	Text	30
License State	Text	10
License Expiry	Date	32
Transmission	Text	30
Account Site	Text	50

Default Vehicle Field Name	Data Type	Maximum Length
Status	Text	30
Location	Text	30
Used/New	Text	30
Engine	Text	30
MSRP	Currency	25
Dealer Invoice Price	Currency	25
Owned By	Text	30
Modified: Date External	Date/Time	32
Modified By	Text	255
Vehicle Currency	Text	30
Interior Color	Text	30
Warranty Type	Text	30
Warranty Start Date	Date	32
Warranty End Date	Date	32
Current Mileage	Number	16
Mileage Reading Date	Date	32
Product Name	Text	100
Type	Text	255
Body	Text	30
Description	Text	250
Owner	Email	50
Created: Date External	Date/Time	32
Row Id	Id	15

Default Vehicle Field Name	Data Type	Maximum Length
Integration ID	Text	30
Account Id	Id	15
Account Integration Id	Text	30
Custom Object *N*	Text	50
Indexed Picklist 1	Text	30
Indexed Picklist 2	Text	30
Indexed Picklist 3	Text	30
Indexed Picklist 4	Text	30
Indexed Picklist 5	Text	30
Indexed Picklist 6	Text	30
Indexed Number	Number	16
Indexed Date	Date/Time	32
Indexed Currency	Currency	25
Indexed Long Text	Text	255
Indexed Short Text 1	Text	100
Indexed Short Text 2	Text	100
Indexed Checkbox	Boolean	1
Product Category	Text	100
Part #	Text	50
Purchase Date	Date	32
Purchase Price	Currency	25
Quantity	Number	16
Ship Date	Date	32

Default Vehicle Field Name	Data Type	Maximum Length
Install Date	Date	32
Expiration Date	Date	32
Notify Date	Date	32
Contract	Text	30

Import Assistant

The following topics describe how to use the Import Assistant to import your company data into Oracle CRM On Demand:

Importing Your Data

Before you begin. Prepare your CSV files and add any necessary fields or picklist values to the application. For more information, see Preparing for Data Importing (on page 1656). Before importing data, you can determine which method of data importing best suits your requirements by reviewing the supporting documentation on My Oracle Support.

After you have prepared your data for importing, access the Import Assistant, and perform the import. To ensure that the Import Assistant processes all import requests equally, each import request is split into one or more child requests of 100 records. Child requests from different import requests are processed simultaneously, so that no import request is waiting for another request to complete before it is picked up in the queue. The processing time for an import request is updated continuously and reflects the progress of the child requests in the queue.

TIP: Make sure that your import CSV file is set up correctly by doing a test import of five records. It is much easier to correct mistakes for five imported records than for the full number in your import file.

To import records

1. In the upper right corner of any page, click the Admin global link.
2. In the Data Management Tools section, click the Import and Export Tools link.
3. In the Import Data section, select the record type you want to import from the drop-down menu.
4. Click the Launch button.

   This starts the Import Assistant.
5. For Step 1:

   NOTE: The following options are available depending on the record you wish to import.

   a. Select how you want the Import Assistant to identify matching records.

      The Import Assistant uses an external unique ID, which is a unique external ID field that is imported from another system, Oracle CRM On Demand row ID, and Oracle CRM On Demand pre-defined fields. These pre-defined fields, such as Account Name and Location, do not have IDs.

      For information on how duplicate records are defined, see About Record Duplicates and External IDs (on page 1635).

b Select what you want the Import Assistant to do if it finds a duplicate unique record identifier in Oracle CRM On Demand. Your choices are to not import duplicate records, to overwrite existing records or to create additional records.

NOTE: This option is not available in Notes.

c Select the action you want the Import Assistant to follow if the imported record's unique record identifier does not match an existing record in Oracle CRM On Demand.

NOTE: This option is not available in Notes. If you select Overwrite Records and Don't Create New Record in the previous option, this results in the record being updated.

d Select how you want to handle picklist values in your CSV file that do not match the values in the application.

The Import Assistant can either add the new value to the picklist or will not import the field value. The option that you choose applies to both single-value picklist fields and multi-select picklist fields.

NOTE: This option is not available when importing Notes or if your user language is different from the company's default language.

e Decide if the Import Assistant should create a new record for missing associations (related records) in your data file.

NOTE: This option is only available when importing Accounts or Contacts.

f Select the date/time format used in the CSV file.

For more information, see Field Type Guidelines for Importing Data (on page 1651).

g Verify that the file encoding selection is Western.

NOTE: Do not change this setting unless you are certain another encoding method is used. The default, Western, applies to most encoding systems in Europe and North America.

h Select the type of CSV delimiter used in your file: comma or semicolon.

i In the Error Logging drop-down list, select what you want Oracle CRM On Demand to log: All messages, Errors and Warnings, or Errors Only.

j Select the CSV file whose data you want to import.

k Select the Data file records need to be processed sequentially check box if required.

NOTE: Choosing to process data files sequentially ensures that when an import request is submitted, the child import requests are always processed in sequence. It also ensures that CSV file dependencies are maintained.

l Select the Enable Email Notification check box if you want an email notification to be sent after the import process is complete. This check box is selected by default.

m Select the check box if you want to disable auditing while importing data and if you do not want to generate any audit trail records while importing data.

NOTE: You cannot disable this auditing setting if you are importing the User record type. This option is available only if the Manage Record Auditing for Imports privilege is enabled for your role. Selecting this check box might improve import performance, depending on the record types that you want to import and the number of audited fields that you would otherwise decide to audit for those record types.

n Specify whether you want to allow multi-select picklist fields to be updated to null values through the import operation:

- If you want to allow multi-select picklist fields to be updated to null values through the import operation, then select the Import Blank Values in Multi Select Picklists check box if it is not already selected.

- If you do not want to allow multi-select picklist fields to be updated to null values through the import operation, then deselect the check box if it is already selected.

  The initial setting in the Import Blank Values in Multi Select Picklists check box in the Import Assistant is determined by the setting in the corresponding check box on the company profile, but you can change the setting.

6 For Step 2:

   a Follow the instructions for validating your file, if necessary.

   b Select a field mapping file, if available.

   c Field mapping files (.map) contain the pairing of fields in your CSV file with existing Oracle CRM On Demand fields. After you perform an import, the system sends you an email containing the .map file with the recent mapping scheme. Save it to your computer to re-use it during later imports.

7 For Step 3, map the fields in your file to Oracle CRM On Demand fields. At a minimum, you need to map all required fields to column headers in the CSV file.

   The Import Assistant lists the column headers from your import CSV file next to a drop-down list showing all the fields in that area in Oracle CRM On Demand, including custom fields you added.

   If the address field you need does not appear in the drop-down list, select the corresponding one shown in this table.

To filter your list on this field	Select this field from the drop-down list
Street Number Address 1 Chome	Number/Street
Ku	Address 2
Floor District	Address 3
Shi/Gun	City
Colonia/Section CEDEX Code Address 4 URB Township	PO Box/Sorting Code
MEX State BRA State Parish Part of Territory Island Prefecture Region Emirate Oblast	Province

To filter your list on this field	Select this field from the drop-down list
Island Code Boite Postale Codigo Postal	Zip/Post Code

If you selected a .map file, verify that the fields map correctly. Custom fields created since you ran the previous import might need to be mapped.

For information about external IDs, see About Record Duplicates and External IDs (on page 1635).

CAUTION: If you have selected the wrong file to import, click Cancel to change selections. At this point, using the Back button does not clear the cache, so the import file you originally selected appears in the field mapping step.

CAUTION: External Unique ID and Manager External ID are key fields that are used to associate Contacts with their Manager Records. If these fields are not mapped, the Manager Record will be associated with Contacts using the Contact Name and Manager fields. When using the Contact Name and Manager fields to do this association, the data file records will be subject to more stringent dependency ordering.

8. For Step 4, follow the onscreen instructions, if necessary.
9. For Step 5, click Finish.

To view the queue for your import requests

1. In the upper right corner of any page, click the Admin global link.
2. In the Import and Export Queues section, click the Import Request Queue link.

   The Import Request Queue page appears with information about your requests, including the estimated time of completion.

   The following table describes the import status.

Status	Description
Queued	The import has not been processed yet.
In Progress	The import is being processed. **NOTE:** You can delete the request in this state. However, you must review any data that is partially imported into Oracle CRM On Demand.
Completed	No errors during import.
Completed with errors	The import completed but there were some errors with some of the records.
Failed	The import completed but none of the records were imported.
Error	The import did not complete because an error occurred.

Status	Description
Cancelled	The import was cancelled.

The following table describes the import record information.

Import Record Information	Description
# Submitted	The number of records contained in the CSV file.
# Processed	The number of records the import engine has currently processed. This field is processed every 20 seconds, or as set by a system process.
# Successfully Imported	The number of records that were imported without any problems.
# Partially Imported	The number that was imported but not all the fields for the record were imported.
# Not imported	The number of records that were not imported at all.
#Cancelled	The number of records imported before the import was cancelled.

Reviewing Import Results

You can track the progress of the import by reviewing the queue page in Oracle CRM On Demand. When the import request is completed, you can navigate to the import queue, and drill down on the completed import job. Each import request contains the submitted data file, generated map file, and a log file. This log file provides basic, log file information, including errors, the status of the import, and so on. If an error occurs during the import, it is recommended that you review the log file attached to the import request.

If you enabled email notification during import preparation, then you will receive an email message when your import request is completed. The email message summarizes the import and may have a map file and a log file attached to it. The log file lists the records and fields that were not imported.

You can then correct the data in your CSV file and import the information again. The second time, you should direct the system to overwrite existing records when it encounters duplicate records.

If the size of the log file for an import request is not greater than 2 MB, then Oracle CRM On Demand attaches the file to the email. If the size of the log file is greater than 2 MB, then Oracle CRM On Demand zips the file. If the size of the zipped file is not greater than 2 MB, then the zipped file is attached to the email. Otherwise, the file is not attached to the email.

The map file is attached to the email provided that the combined size of the attachments is not greater than 2 MB. If the combined size of the attachments is greater than 2 MB, then Oracle CRM On Demand zips the map file and attaches it, provided that the combined size of the attachments is not greater than 2 MB. Otherwise, the map file is not attached to the email.

You can access the unzipped attachments, as well as the emails, through your personal email monitor. For information about accessing your personal email monitor, see Accessing Your Pending and Sent Emails (on page

764). If your user role has the Access Master Audit Trail and Admin Configuration Audit privilege, then you can also access the emails and attachments for all users through the company email monitor. For more information, see Reviewing Your Company's Pending and Sent Emails (on page 1178).

To view your import request queue

1. In the upper right corner of any page, click the Admin global link.
2. In the Import and Export Tools section, click the Import and Export Tools link.
3. In the Import and Export Queues section, click the Import Request Queue link.

   The Import Request Queue page appears, showing the time the import was completed or estimating the completion time.

To review the email message with import results

- Go to your email application and open the email message from Oracle CRM On Demand.

  The message lists any errors that occur on a record-by-record basis along with action you should take, if you want to capture the complete data for that record.

Related Topics

See the following topic for related information:

- Example of Import Results Email and Log File (on page 1832)

Example of Import Results Email and Log File

If you enabled email notification during import preparation, then you will receive an email message when your import request is completed. This email summarizes the import results:

Dear Mike,

Your import request completed at 3/30/2007 7:10:06 AM. Here is a summary of the results:

User: qa/mjones

Import Type: Account

Import File Name: Accounts.csv

Time Completed: 3/30/2007 7:10:06 AM

Total Records: 496

Successfully Imported: 495

Partially Imported: 1

Duplicate Records Ignored: 0

Failed: 0

For more details on your import, please review the log file. If you require further assistance, refer to the online help.

Thank you for using Oracle CRM On Demand,

Oracle CRM On Demand Customer Care

Attached to the email is a log file listing each error that occurs during the import process, such as the following:

Record Specific Error EXTERNAL_SYSTEM_ID: 46552 No matching record is found for import field 'CURRENCY' with value 'INR'. The Oracle CRM On Demand field 'Account Currency' was not updated, but other field values were imported for this record.

Export Assistant

The following topics describe how to use the Export Assistant to export your Oracle CRM On Demand data:

- Exporting Your Data (on page 1833)
- Reviewing Export Results (on page 1836)

Exporting Your Data

You can fully or partially export your company's data, including attachments for specific record types, from Oracle CRM On Demand to an external file. The export generates one or more ZIP files that contain individual CSV files for each record type you select to export. The generated export files are 1.5 GB each or smaller in size.

NOTE: If your company uses an industry-specific edition of Oracle CRM On Demand, then those record types that are specific to your industry, such as Households and Funds with their linked activities and notes, are excluded from the export. Also, if you export records for *recurring* opportunity products, then Oracle CRM On Demand populates the Parent_ID column for that row. For non-recurring records, the Parent_ID cell is empty.

About Limits for Partial Exports

Your company can perform one full export every seven days. For partial exports, the number of records that your company can export in a seven-day period is based on the number of user licenses that your company purchases for Oracle CRM On Demand. For each license, 1000 records can be exported in partial exports in a seven-day period.

The following examples show how the limit on partial exports works for a company that purchases five user licenses for Oracle CRM On Demand and can therefore export a maximum of 5000 records in a seven-day period:

- **Example 1.** In the last seven days, 4000 records were exported through partial export requests. A user now submits a partial export request for 2000 records.

  In this case, the partial export request fails because the request would bring the total number of records exported within the seven-day period to 6000, which exceeds the limit of 5000 records.
- **Example 2.** In the last seven days, no records were exported through partial export requests. Two users now submit separate partial export requests. One of the export requests is for 3000 records, and the other is for 2000 records.

  In this case, both of the partial export requests succeed because the requests bring the total number of records exported within the seven-day period to 5000, which does not exceed the limit. However, any subsequent partial export requests that are submitted within the next seven days will fail because the limit of 5000 records for the seven-day period has already been reached.

NOTE: Records that are exported through List pages are not counted when Oracle CRM On Demand calculates the number of records exported through partial exports in a seven-day period.

About the Retention Period for Export Requests and Export Request Attachments

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

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

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

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

- Export Request Expiry (Days)
- Export Request Attachment Expiry (Days)

For information about updating these fields, see Configuring Company Settings (on page 1124).

Before you begin. To perform this procedure, your role must include the Admin Export privilege.

To export your company's data

1. In the upper right corner of any page, click the Admin global link.
2. In the Data Management Tools section of the Admin Homepage, click the Import and Export Tools link.
3. On the Import and Export Tools page, click the Export Data link.
   This starts the Data Export Assistant.
4. For Step 1:
   a. Do one of the following:
      - If you wish to perform a full export, select the Export All Record Types radio button.
      - If you wish to perform a partial export, select the Export Selected Record Types radio button and the record types you wish to export. You can export all data for a record type or data for individual child records.
      - If you want to export the attachments for specific record types, then select these record types from the All Attachment Data section. For more information on exporting attachments, see Managing Your Company's Attachments (on page 1862).

      NOTE: The exported attachment file has the following naming convention: <Object>_<ObjectRowId>_<ExportRequestId>.<FileExtension>, for example, Opportunity Attachment_AALA-3135W8_AALA-864XW0.pptx.

   b. Click Next.

   The data for parent and child record types is exported to a separate CSV file within the ZIP file.

   CAUTION: If you are exporting Notes data in Oracle CRM On Demand, the CSV file contains all the public Notes created in Oracle CRM On Demand as well as the private Notes belonging to the user exporting the data.

5. For Step 2:
   a. Select the time zone used in the exported CSV file.
   b. Select the date/time format used in the exported CSV file.

      NOTE: If you select dates for a full export, then the full export changes to a partial export.

   c. Select the type of CSV delimiter used in your file: comma or semi-colon.
   d. Select a time range filter to limit the data in your export.

      NOTE: The first time you export your data, you might not want to filter on dates. After that, however, consider setting up incremental exports by filtering the data on dates since the previous export.

   e. Select the Enable Email Notification check box if you want an email notification to be sent after the export process is complete.
   f. Click the Export Attachment Details Only check box if you only want to export the attachment details, and if you do not want to export any attachment content. You can export the attachment details of all record types and their corresponding fields.

NOTE: This check box is only available if you selected a record type in the All Attachment Data section in the previous step.

g Select the Include Weblink URL in Export Files check box if you want URLs to be included in the exported CSV file.

The default value of the Include Weblink URL in Export Files check box is controlled by the Include Weblink URL in Export Files check box in the company profile. You can choose to select or to deselect this setting for each export request. For more information about this check box, see Configuring Integration Settings (on page 1144).

h If you are exporting the attachments for one or more record types, and if you want the ZIP file of the attachments to be scanned for viruses, then make sure that the Scan export .zip file for viruses check box is selected.

When this check box is selected, the ZIP file of attachments is scanned for viruses and if any virus is found, the ZIP file is not exported.

This check box is selected by default. If you deselect the check box, then the ZIP file of attachments is not scanned for viruses and it is recommended that you use scanning software on your local machine to check the contents of the ZIP file after you download it.

NOTE: Each attachment is scanned for viruses before it is uploaded to Oracle CRM On Demand and if a virus is found, then the file is not uploaded. However, when you attempt to export attachments, a later version of a virus definition in the scanning software might result in a virus being detected that could not be detected at the time that the attachments were uploaded. Also, a scan might occasionally return a result indicating that a virus is present even if no virus is present.

i Click Next.

6 For Step 3, review the summary, and click Finish to submit the export request.

7 On the Export Requested page, click the Export Request Queue link to check the status of your request.

The following table describes the possible export status values.

Status	Description
Queued	The export has not been processed yet.
Re-queued	The export request has been resubmitted to the queue.
In Progress	The export is being processed. If you cancel the export, then this status is changed to Canceling and then to Canceled.
Completing	All records have successfully exported. The export process is preparing the corresponding email, summary file, and ZIP file for download. This process might take from 30 seconds to a minute to complete.
Completed	The export completed with no errors.
Completed with errors	The export completed but there were some errors with some of the records.

Status	Description
Cancelling	If you cancel an export request with a status of Queued, then the export request is cancelled immediately. If you cancel an export request with a status of In Progress, then the status changes to Cancelling. Canceling may take multiple minutes and if the export completes before it can be canceled, then the final status changes to Completed. You can cancel the export request for either the parent request or the child requests. When you cancel the export request for the parent request, any exported child record types are available to download. However, any child record types that have not been exported are canceled, and they are not available to download. When you cancel the export request for child requests, only the child record type export is canceled, and it is not available to download. You can continue to download other child record types under the parent export request.
Cancelled	After the export request is completely cancelled, the status changes to Cancelled.
Failed	The export was completed, but none of the records were exported.
Error	The export did not complete because an error occurred. For more information about troubleshooting errors when exporting your data in Oracle CRM On Demand, see 1802395.1 (Article ID) on My Oracle Support.

For more information about the Export Request Queue page, see Reviewing Export Results (on page 1836).

Reviewing Export Results

The Export Request Queue page displays all of the pending and completed export requests that were submitted through the Data Export Assistant. If a request is in the Pending Requests section, then you can click Refresh to see if the request has completed. When the request has completed, you can drill down on a request to retrieve the output file.

NOTE: The Export Request Queue page does not show the export requests that were submitted through List pages. However, if your user role has the Access Master Export Requests privilege, then you can view all export requests, including the requests that were submitted through List pages, in the Master Export Request Queue page. For more information, see Reviewing All Export Requests for Your Company (on page 1181).

About the Retention Period for Export Requests and Export Request Attachments

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

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

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

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

- Export Request Expiry (Days)
- Export Request Attachment Expiry (Days)

For information about updating these fields, see Configuring Company Settings (on page 1124).

The following procedure describes how to view export requests.

Before you begin: To perform this procedure, your user role must have the Admin Export privilege.

To view export requests

1. In the upper right corner of any page, click the Admin global link.
2. In the Data Management Tools section, click the Import and Export Tools link.
3. On the Import and Export Tools page, click the Export Request Queue link.

   The Export Request Queue page appears, showing the details of the export requests. The following table describes the export request information.

Export Record Information	Description
Export Type	The type of export: - **Full.** A full export of your company's data. - **Partial.** A partial export of your company's data.
Record Type	The record type. For partial requests that include child records, the child record is indicated in the format *Parent*:*Child*, for example, Account:Contact.
Status	The status, for example, In Progress or Completed.
Requested By	The user who submitted the request.
Submitted	The time and date when the export request was submitted.
Enable Email Notification	If this check box is selected, then an email notification is sent when the export process is completed.
Completed	The time and date when the export was finished.

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

To review the details of an export request

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

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

For information about downloading and deleting export request attachments, that is, the ZIP files that contain the output from the export requests, see Downloading and Deleting Export Request Attachments (on page 764).

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

Oracle Data Loader On Demand Client Utility

The following topics describe how to use the Oracle Data Loader On Demand client to import your Oracle CRM On Demand data:

- About the Oracle Data Loader On Demand Client Utility (on page 1838)
- Downloading the Oracle Data Loader On Demand Client Utility (on page 1838)

About the Oracle Data Loader On Demand Client Utility

The Oracle Data Loader On Demand client is a command-line utility, which provides a means of importing data into Oracle CRM On Demand from external data sources. It has two functions:

- **Insert function.** This function takes records from a file and adds them to Oracle CRM On Demand.
- **Update function.** This function modifies existing records in Oracle CRM On Demand, using records from an external data source.

For more information, see Oracle Data Loader On Demand Guide, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network.

Downloading the Oracle Data Loader On Demand Client Utility

Complete the following procedure to download this utility. To install and use this utility, see Oracle Data Loader On Demand Guide, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network.

To download the Oracle Data Loader On Demand utility

1. Sign in to Oracle CRM On Demand, and click Admin.
2. Under Data Management Tools, click Import and Export Tools.
3. Under Oracle Data Loader On Demand, click Oracle Data Loader On Demand.
4. Save the ZIP file to your computer.

Web Services Integration

Oracle CRM On Demand allows you to:

- Access and change your Oracle CRM On Demand data from a Web services-enabled application
- Create your own applications that integrate with Oracle CRM On Demand

You can:

- Download Web Services Description Language (WSDL) files to help you develop applications that access Oracle CRM On Demand using the Web services interface, see Downloading WSDL and Schema Files (on page 1839).
- Download WSDL and Schema files for using the methods of the Integration Events Web service to access the integration queues, and track changes for particular record types. You can also download Schema files to track custom and renamed fields for the supported record types.
- View a summary of Web services used by your company, see Reviewing Web Services Utilization (on page 1841).

CTI Integration API

One of the WSDL files available from the Web Services Administration page is for the CTI Activity Web service, which is part of the computer telephony integration (CTI) Integration application programming interfaces (API). The CTI Integration API provides the ability to integrate Oracle CRM On Demand directly with third-party CTI software by using Web service integration. For more information about the CTI Integration API, see Oracle CRM On Demand CTI Developer’s Guide.

Downloading WSDL and Schema Files

The Web services provided by Oracle CRM On Demand allow users of client applications to interact with Oracle CRM On Demand, for example, to insert, update, delete, and query records and to perform a number of administrative tasks.

The Web services are available through:

- **Web Services v1.0.** Used to interact with Custom Objects 01-03, as well as preconfigured objects.
- **Web Services v2.0.** Used to interact with all Oracle CRM On Demand custom objects, as well as preconfigured objects, as well as their custom Web applets. Compared to Web Services version 1.0, the Web Services version 2.0 API also offers additional options for issuing queries, using the QueryPage method.
- **Service APIs.** Used to manage administrative tasks through Web services. For example, service APIs allow the administration of users in Oracle CRM On Demand, and provide the ability to issue queries for system and usage information in relation to Oracle CRM On Demand.
- **Administrative Services**. Used to interact with Oracle CRM On Demand metadata through Web services. Administrative Services provides the capability of reading and loading Oracle CRM On Demand metadata in an XML format.

From the Web Services Administration page you can:

- Download the Web Services Description Language (WSDL) files used by applications that access the Web services
- Download schema files
- Access the Web services documentation

Downloading WSDL Files for Web Services v1.0 and Web Services v2.0

You can download a WSDL file for each record type and you can choose the child record types to include in the WSDL file for the parent record type.

To download a WSDL file for Web Services v1.0 and Web Services v2.0

1. In the upper-right corner of any page, click the Admin global link.
2. In the Web Service Integration section, click Web Services Administration.
3. From the Select Service list, select Web Services v1.0 or Web Services v2.0 as required.
4. From the Document list, select WSDL.
5. From the Type list, select Custom or Generic.

Depending on whether you select Custom or Generic, custom fields are displayed differently in the WSDL. For Custom WSDL, the XML tags for the custom fields are based on the Integration tags from Field Setup, see Setting Up Custom Field Integration Tags (on page 1232). Custom WSDL allows you to generate WSDL that is specific to your company and that uses your company's field-naming conventions.

For Generic WSDL, the custom fields are based on generic XML tags: CustomNumber0, CustomCurrency0, and so on. Using these placeholders, together with the Mapping Service allows applications to map to the field names that your company uses.

6. From the WSDL Object list, select the required record type, for example, Account.

   The objects displayed in the WSDL Object list depend on the record types that are set up for your company. All of the child record types for the selected record type are displayed, in alphabetical order, in the Available Related Information list, regardless of whether you have access to the child record types. For Web Services v2.0, CustomWebApplet is also displayed.
7. Move the child record types that you wish to include in the WSDL from the Available Related Information list to the Selected Related Information list.
8. Click the Download button.
9. Save the WSDL file to your computer.

Downloading WSDL Files for Service APIs

You can download WSDL files for each of the service APIs. If you download the WSDL for Integration Event, you must additionally download the Schema files for each of the record types for which you wish to generate integration events, see the "Downloading Schema Files for Integration Events" section.

To download a WSDL file for Service APIs

1. In the upper-right corner of any page, click the Admin global link.
2. In the Web Service Integration section, click Web Services Administration.
3. From the Select Service list, select Service APIs.

   NOTE: If you select the Merge Service API, you can select Custom or Generic from the Type list and download a Schema file for this Service API.
4. From the Type list, select Custom or Generic.
5. From the WSDL Object list, select the required name of the Service API.
6. Click the Download button.
7. Save the WSDL file to your computer.

Downloading WSDL Files for Administrative Services

You can download WSDL files for each Administrative service.

NOTE: To download the Assessments Scripts WSDL or the Access Profile WSDL, your user role must include the Manage Roles and Access privilege.

To download a WSDL file for Administrative Services

1. In the upper-right corner of any page, click the Admin global link.
2. In the Web Service Integration section, click Web Services Administration.
3. From the Select Service list, select Administrative Services.
4. From the WSDL Object list, select the required service..
5. Click the Download button.
6. Save the WSDL file to your computer.

Downloading Schema Files for Integration Events

The Integration Events Web service uses Schema (XSD) files in its WSDL, which you download in addition to the integrationevents.wsdl file. The WSDL file contains placeholders for the XSD schema files of all record types for which your company currently has active integration event actions defined. Generic Schema files are available. However, if you create custom fields or rename fields for a record type, then you must download a Custom Schema. For more information about the Integration Events Web service, see *Oracle Web Services On Demand Guide*.

To download a Schema file for integration events

1. In the upper-right corner of any page, click the Admin global link.
2. In the Web Service Integration section, click Web Services Administration.
3. From the Select Service list, select Web Services v1.0 or Web Services v2.0.
4. From the Document list, select Schema.
5. From the Type list, select Custom or Generic.

   Depending on whether you select Custom or Generic, custom fields are displayed differently in the Schema file. For Custom Schema, the XML tags for the custom fields are based on the integration tags from Field Setup. For Generic Schema, the custom fields are based on generic XML tags.
6. From the WSDL Object list, select the required record type, for example, Account.

   The objects displayed in the WSDL Object list depend on the record types that are set up for your company.
7. From the Select Related Information list, select the child record types that you wish to include in the Schema.
8. Click the Download button.
9. Save the Schema file to your computer.

Accessing the Web Services Documentation

To access the Web services documentation, click Release Documentation in the title bar on the Web Services Administration page. The Oracle CRM On Demand Documentation page is displayed from which you can access the Web services and other documentation for different Oracle CRM On Demand releases.

Reviewing Web Services Utilization

From the Web Services Utilization Page, you can review a summary of the Web services used by your company. By default, the Web service requests are listed by session ID. The Web Service client Name, Web Service name, operation, number of operations, start time, end time, and user alias for the session are displayed. The following table describes what you can do from the Web Services Utilization page.

To do this	Follow these steps
Create a new list of Web Service requests	On the title bar, click Menu, and select Create New List. Complete the relevant steps described in Creating and Refining Lists (on page 130).
Display details of a Web service request	Click the session ID to display a detail page for the Web service request.
Export the list	On the title bar, click Menu, and select Export List. Complete the steps described in Exporting Records in Lists (on page 143).
Find a Web Service request	Select the required filter criteria in the drop-down lists next to Show results where.

To do this	Follow these steps
Manage all the Web Service request lists	On the title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in Manage Lists Page (on page 140).
Page through the list	Click the navigation icons at the top or bottom of the list page to move to the next page, previous page, first page, or last page in the list.
Refine the search criteria for the list	On the title bar, click Menu, and select Refine List. Complete the relevant steps described in Creating and Refining Lists (on page 130).
Show the key information and filter information for the list	On the title bar, click Menu, and select Show List Filter. Complete the steps described in View List Page (on page 141).
Sort the Web service requests in the list	Click the column header to sort the list according to that column, for example, click Start Time to sort the list according to the start time.
Show more/fewer records	In the Number of records displayed drop-down list at the bottom of the page, select the number of records to see at one time.
View a subset of Web services operations	Click the drop-down list in the title bar and change the selection as required: - **All**. Displays a list of all Web services operations - **All Operations Today.** Displays a list of all Web services operations for today

About Creating a Web Services List

The process for creating or refining a Web services list is similar to that described in Creating and Refining Lists (on page 130). However, the Web Service List pages do not have the Search In section that is provided on the corresponding pages for other record types.

The fields that you can use for filtering a Web services list, and which you can select for display in the search results are as follows:

Field	Description
End Time	The end time of the Web service request.
Entry Type	Possible values are: Login, Logout, and Dispatch. Every Web service call, apart from login and logout, is set to Dispatch for this field because the calls go through the Inbound Web service Dispatcher business service.
Input Message Size (Bytes)	The size of the input message in bytes.
Operation	The operation for the Web service request.
# of Operations	The number of operations in the Web service request.

Field	Description
Output Message Size (Bytes)	The size of the output message in bytes.
Session ID	The session identifier of the Web service request. This is actually the foreign key for the corresponding session in the login history table, and not the actual session ID used in the Web service request.
Start Time	The start time of the Web service request.
User Alias	The user alias of the user who executed the Web service request.
Type	The user agent value for the request. For non-Oracle client integrations, this value defaults to Web Services.
Web Service Client Name	The name of the Web service client from which the request was made.
Web Service Name	The name of the Web service to which the request was made.
Web Service Space	The namespace used in the request.

Oracle Migration Tool On Demand Client Utility

The following topics describe how to use the Oracle Migration Tool On Demand client to export your Oracle CRM On Demand data:

- About the Oracle Migration Tool On Demand Client Utility (on page 1843)
- Downloading the Oracle Migration Tool On Demand Client Utility (on page 1844)

About the Oracle Migration Tool On Demand Client Utility

The Oracle Migration Tool On Demand client is a utility that eliminates the need to copy customized configurations manually from one Oracle CRM On Demand environment to another environment. For example, you might want to copy customized configurations from a customer test environment to a production environment. You can use this client utility with the Administration Services, which is a set of administration Web services, to automate the administration of your company's configurations. This client utility enables you to extract and import specific configuration information directly to and from your computer. You can import the configurations immediately or in batch mode. The Administration Services enable client applications to access the configurations. You can import the following configurations:

- Access profiles
- Action bars
- Assignment rules and rule groups
- Cascading picklists
- Client side extensions
- Concatenated fields
- Custom HTML head tag additions
- Custom record types
- Custom Web applets

- Custom Web links
- Custom Web tabs
- Field audit setup
- Field management definitions
- Homepage layouts
- Integration event queues
- Lead conversion mappings
- Lists
- List access and order settings
- Modification tracking settings
- Page layouts
- Picklists
- Picklist value groups
- Process administration and process administration transition states
- Related information layouts
- Role associations for report folders
- Roles
- Sales assessment templates
- Sales categories
- Sales processes
- Sales stages
- Search layouts
- Workflow rules, action sets, and user sets

Downloading the Oracle Migration Tool On Demand Client Utility

Complete the following procedure to download the client utility, and follow the steps in Oracle Migration Tool On Demand Guide to install, configure, and use this client utility. Oracle Migration Tool On Demand Guide is available from the Oracle CRM On Demand documentation library on Oracle Technology Network. For information on downloading the Web Services Description Language (WSDL) that you require to access the Administrative Services, see Downloading WSDL and Schema Files (on page 1839). For information about the APIs provided by the Administrative Services, see Oracle Web Services On Demand Guide, which is available from the Oracle CRM On Demand documentation library on Oracle Technology Network.

To download the Oracle Migration Tool On Demand client utility

1. Create a directory on your computer in which to extract the Oracle Migration Tool On Demand files, for example, `C:\Oracle Migration Tool On Demand`.
2. Sign in to Oracle CRM On Demand, and click Admin.
3. Under Data Management Tools, click Import and Export Tools.
4. Under Metadata Import and Export Tools, click Oracle Migration Tool On Demand.
5. Save the ZIP file to your computer.

Batch Delete and Restore Queue Page

The Batch Delete and Restore Queue page displays the active and completed batch delete and restore requests submitted by your company. The following requests are displayed:

- Active and completed batch delete requests that were performed through the Batch Delete option on List pages.

- Completed delete requests that were submitted through Web services with the AvailableForBatchRestore element in the request set to true. If a Web services request deletes child records as well as parent records, then there are separate request records for each record type.
- Active and completed restore requests that were performed from the Batch Delete and Restore Queue page.

Before you begin. To view all batch delete and restore requests on this page, your user role must include the Batch Delete and Restore privilege. To restore lists of records that you deleted, your user role must include the Batch Delete and Restore privilege. To restore lists of records that were deleted by another user, your user role must include the Recover All Records privilege as well as the Batch Delete and Restore privilege.

From this page, you can do the tasks shown in the following table:

To Do This	Follow These Steps
Cancel an active request	When you delete or restore a list of records, you receive a confirmation email stating that Oracle CRM On Demand has successfully prepared the batch delete or restore request on the Batch Delete and Restore Queue page. You can click the Cancel link to cancel the request up until you click the Proceed link beside the request and Oracle CRM On Demand begins to process the request.
Proceed the active request	Click the Proceed link next to the request to finalize the batch delete or restore request.You receive a confirmation email stating that the batch delete or restore request has been completed and that the list of records is deleted or restored.
Display the number of records	In the Number of Records Displayed drop-down list, select a number of requests to see at one time.
Delete the processed request	Click the Delete link to delete the batch delete or restore request from the Processed Requests queue. **NOTE:** If a processed batch delete request has not been restored, that is, the status is Deleted, then the request cannot be restored in the future.
Show a summary of the completed request	You can do one of the following: - Click the View Delete Log link to see the summary log for delete requests. - Click the View Restore Log link to see the summary log for restore requests.
Restore the deleted records	Click the Restore link next to the delete request to restore the deleted records that have not been purged from Oracle CRM On Demand.

To Do This	Follow These Steps
Expand the list of processed requests	If a processed request is not shown in the Batch Delete and Restore Queue page, then you can expand the list of requests by clicking Show Full List. The list of requests opens in the Data Management Request List page. In that page, you can search for a request and you can also use the list features to help you to find the request that you want. In the title bar of the page, click Menu, and then select the option for the task that you want to perform, as follows: - **Export List.** Export the list to a file, see Exporting Records in Lists (on page 143). - **Record Count.** Count the records in the list, see Counting Records in Lists (on page 143). - **Refine List.** Refine the list, see Creating and Refining Lists (on page 130). For example, you can change the list filter, select different fields to display, or change the sort order for the list. - **Save List.** Save the list. Selecting this option opens a page where you can select options for saving the list. - **Show List Filter.** View the filter that is currently defined for the list. - **Create New List.** Create a new filtered list, see Creating and Refining Lists (on page 130). - **Manage Lists.** View details of the list, or change the order in which the list appears in the picklist of lists on the List page, see Manage Lists Page (on page 140).

Batch Assign Request Queue Page

The Batch Assign Request Queue page displays the active and completed batch requests submitted by your company for:

- Book assignments. To see the batch requests for book assignment, your user role must have the Manage Books privilege.
- Team member assignments. To see the batch requests for team assignments, your user role must have the Batch Assign Team Members privilege.

To Do This	Follow These Steps
Cancel	Click the Cancel link next to the request. You can cancel a request until its status changes to 'In Progress'.

To Do This	Follow These Steps
Display details of a request	Drill down on the list name for the request. On the request Detail page, you can view the request properties and request parameters.
Show more or fewer requests	In the Number of Records Displayed drop-down list, select the number of requests to see at one time.
Delete the processed request	Click the Delete link to delete the request from the Processed Requests queue.
Log	Click the Log link to save the request as a log file.

When the request has completed, you receive an email notification.

For information on creating batch requests for book assignments, see Assigning Records to Books (on page 1454). For information on creating batch requests for team member assignments, see Assigning a Team Member to a List of Records (on page 148).

Batch Assign Request Detail Fields

The following table describes some of the fields that are displayed when you drill down on the list name for a batch assign request.

Field	Description
Type	Indicates the type of request that was submitted.
List Name	The name of the list for which the request was submitted.
#Processed	The number of records in the list for which the request was submitted.
#Succeeded	The number of records that were successfully updated by the request.

Related Field Initialization Queue Page

When you save a new custom related information field, Oracle CRM On Demand automatically submits a request to initialize the new field. The initialization process populates the custom related information field on the records with the value of the corresponding field in the records of the related record type. The Related Field Initialization Queue page displays the active and completed requests to initialize custom related information fields. From this page, you can perform the tasks shown in the following table.

To Do This	Follow These Steps
Log	Click the Log link to view the status of the initialization request.

To Do This	Follow These Steps
Delete the processed request	Click the Delete link to delete the request from the Processed Requests queue.
Resubmit	If the request to initialize the custom related information field failed, then you can click Resubmit to start the initialization process again. If the request completed successfully, then the Resubmit option is not available.

Related Topics

See the following topics for related information:

- About Custom Related Information Fields (on page 1226)
- Creating Custom Related Information Fields (on page 1227)

About Integration Events

An *integration event* is a mechanism for triggering external processes based on specific changes (create, update, delete, associate, dissociate) to the records in Oracle CRM On Demand. Integration events contain information about the data that was changed by the user. This information is stored in one or more integration event queues as an XML file, which allows the details of events in Oracle CRM On Demand to be accessed by external applications. For example, an external application might need to track Account changes in Oracle CRM On Demand and trigger local updates accordingly.

For customers who require multiple applications to integrate with Oracle CRM On Demand independently, the company administrator can define multiple integration event queues. Using the integration event functionality, the same event can be generated for multiple queues, and the external applications are guaranteed queue integrity, because the external applications can be configured to request only the events from a specific queue.

About Setting Up Integration Event Administration

If you are a new customer, then the integration event functionality is automatically enabled. However, if you are an existing customer, then the Oracle CRM On Demand integration event functionality must be configured by Oracle CRM On Demand Customer Care and by your company administrator. Contact Oracle CRM On Demand Customer Care to request support for Integration Event Administration and to specify the maximum total size of the integration event queues.

Note: The maximum size of the integration queues is not displayed on your Company Profile page.

When Oracle CRM On Demand Customer Care has set up the integration event functionality, the Integration Event Administration link is visible in the Data Management Tools section of the Admin Homepage. Also, the Administrator user role has the Manage Integration Event Queues privilege and the Enable Integration Event Access privilege enabled. For more information about user roles, see Adding Roles (on page 1396).

About Creating, Storing, and Accessing Integration Events

To trigger the creation of integration events, you must create workflow rules with Create Integration Event actions. For each such action, you can specify which fields on a record are to be tracked. When the value changes in a tracked field, the change is recorded in an integration event. You can also specify to which queues the integration events are written. For more information about workflow rules, see About Workflow Rules (on page 1491).

Integration events are stored in one or more queues, the maximum total size of which is specified for your company by the Customer Care representative. A default integration event queue is provided, and you can create additional queues.

When a queue is full, any new integration events are not stored. When the number of integration events in the queue is again below the maximum, new events will once again be added to the queue.

On the Integration Event Settings page, you can delete integration events from a queue. You can also configure Oracle CRM On Demand to send a warning email to a specified address when the queue is full, or when the number of integration events in the queue exceeds a number that you specify.

You can disable integration event queues, including the default queue, but you cannot delete a queue.

External applications access the integration event queues by using the Integration Events Web service, which has two methods:

- **GetEvents**. Retrieves integration events from a queue.
- **DeleteEvents**. Deletes integration events from a queue.

To get and delete events from an integration event queue using Web services, your user role must have the Enable Integration Event Access privilege.

For information about downloading the Web Services Description Language (WSDL) file for the Integration Events Web service, see Web Services Integration (on page 1838). For more information about the Integration Events Web service, see Oracle Web Services On Demand Guide.

Sometimes an integration event queue can contain events that a client application cannot process. For information about how to handle such bad events, see Oracle Web Services On Demand Guide.

- For a step-by-step procedure for creating an integration event queue, see Creating Integration Event Queues (on page 1849).
- For a step-by-step procedure to manage the integration event queues, see Managing Integration Event Settings (on page 1851).
- For a step-by-step procedure to create workflow rules that trigger integration events, see Creating Workflow Rules (on page 1511).

Creating Integration Event Queues

When Integration Event support is enabled, a default integration event queue is provided with Oracle CRM On Demand. However, you can also create additional queues and specify to which queues individual integration events are written.

Before you begin. Integration Event Administration must be set up for your company, as described in About Integration Events (on page 1848). When Integration Event Administration is set up, the maximum number of integration events allowed in the queues is configured as part of your company profile. To perform the following procedure, your user role must have the Manage Integration Event Queues privilege.

To create an integration event queue

1. In the upper-right corner of any page, click the Admin global link.
2. In the Data Management Tools section, click the Integration Event Administration link.
3. On the Integration Event Administration page, click the Integration Event Queue Management link.
4. On the Integration Queue Management page, click New Queue.
5. On the Integration Event Queue Settings Page, complete the following fields, and click Save.

Field	Comments
Queue Name	Enter the name for the queue. Required field.

Field	Comments
Description	Enter a description of the usage of the queue.
Disabled	Ensure that this check box is deselected.
Queue Size	Enter the size of the queue. This size cannot exceed the size shown in the Unassigned Queue Capacity field. Required field. The Integration Event File Limit field shows the total number of events that the company can store for all queues. If the size of the existing queues matches this number, you cannot create a new queue.
Notification Email Address	Enter an email address if a warning email is to be sent when the queue is full or when the queue reaches a certain size.
Send Warning Email When The Number Of Queued Transactions Reaches	Specify the size that the queue is allowed to reach before a warning email is sent to the address specified in the Notification Email Address field.
Picklist Format	This field is required. Select the format for recording picklist field values in the integration events, as follows: - If you want the values to be recorded as language-independent code (LIC) values, then select Language Independent Values. **NOTE:** The LIC values in picklists are usually the same as the values in the English-United States (ENU) locale. - If you want the values to be recorded in the language of the user whose action causes the integration event to be created, then select User Language. **NOTE:** After you create the queue, the Picklist Format field becomes read-only and you cannot change it. If you want to change the picklist format of an integration event queue, then contact Oracle CRM On Demand Customer Care, and ask them to change it for you.

Field	Comments
W3C	Specify 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: ■ If you select this check box, then the values in all fields are recorded in the format specified by the W3C for Web Services v2.0 Schema integration events. ■ If this check box is deselected, 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. By default, the W3C check box is deselected. **NOTE:** If you select the W3C check box, then after you create the queue, the W3C field becomes read-only and you cannot change it.

Managing Integration Event Settings

You can edit the settings for all of the integration event queues.

Before you begin. Integration Event Administration must be set up for your company, as described in About Integration Events (on page 1848). When Integration Event Administration is set up, the maximum number of integration events allowed in the queue is configured as part of your company profile. To perform the procedures described here, you must have the Manage Integration Event Queues privilege in your user role.

To manage integration event settings

1 In the upper-right corner of any page, click the Admin global link.
2 In the Data Management Tools section, click the Integration Event Administration link.
3 On the Integration Event Administration page, click the Integration Event Queue Management link.
4 On the Integration Queue Management page, click the Edit link for the queue.
5 On the Integration Event Queue Settings page, you can perform the following tasks:

Task	Action
Disable a queue.	Select Disabled to disable all queues, including the default queue.
Update the size of a queue.	Enter a value in the Queue Size field. This size cannot exceed the size shown in the Unassigned Queue Capacity field. The Integration Event File Limit field shows the total number of events that the company can store for all queues. If the size of the existing queues matches this number, you cannot increase the size of the queue.

Task	Action
Delete transactions from a queue.	To delete all transactions in the queue, select the When I Click Save, Clear All Transactions check box, and then click Save to delete the transactions. To Delete older transactions, click the calendar icon, and select a date in the When I Click Save, Clear Transactions Older Than field. Click Save to delete the transactions.
Configure Oracle CRM On Demand to send a warning email when the queue is full or when the queue reaches a certain size.	Enter the email address, and (optionally) specify the size that the queue is allowed to reach before the warning email is sent. Click Save to save the email configuration.
Specify how the values of the Date and Time fields (for example, ModifiedDate, CreatedDate) are recorded in the integration events that are created using the Web Services v1.0 Schema and written to this queue.	Select a value from the Time Zone field: - **UTC Format.** If you select this value, then the date and time in the GMT time zone are recorded, in the format specified by the W3C standard for Coordinated Universal Time (UTC), as follows: YYYY-MM-DDTHH:MM:SSZ For example, 2017-06-12T09:44:15Z, which corresponds to June 12th 2017, 9:44:15 GMT. **NOTE:** Fractions of seconds are not recorded. - **UTC.** If you select this value, then the date and time in the GMT time zone are recorded, in the following format: MM/DD/YYYY HH:MM:SS For example, 06/12/2017 09:44:15, which corresponds to June 12th 2017, 9:44:15 GMT. - **User Time Zone.** If you select this value, then the date and time in the time zone of the user who updated the record are recorded, in the following format: MM/DD/YYYY HH:MM:SS For example, 06/12/2017 09:44:15, which corresponds to June 12th 2017, 9:44:15, in the user's time zone. If you leave the Time Zone field blank, then the date and time in the time zone of the user who updated the record are recorded, in the format shown above for the User Time Zone value. After you change the value in the Time Zone field, users must sign out of all Oracle CRM On Demand sessions, including Web services sessions, and then sign in again for the new setting to be used. **NOTE:** You set the Time Zone field for the default queue only. All other queues inherit the setting that is

Task	Action
	selected for the company's default queue. The Time Zone field is displayed for all queues, but it is read-only for queues other than the default queue.
Specify that the values in all fields, including Date and Boolean fields, are to be recorded in the format specified by the W3C for Web Services v2.0 Schema integration events in the integration events that are created using the Web Services v2.0 Schema and written to this queue.	Select the W3C check box. The values in all fields other than the Date and Boolean field types are recorded in the format specified by the W3C for Web Services v2.0 Schema integration events, regardless of the setting in the W3C check box. The values in Date and Boolean fields are recorded in the format that was used in releases earlier than Release 41 of Oracle CRM On Demand, unless the W3C check box is selected. **NOTE:** If you select the W3C check box, then after you save your changes, the W3C field becomes read-only and you cannot change it.

NOTE: The Picklist Format field determines the format for recording the values in picklist fields in integration events that are written to the queue. The values can be recorded in the language of the user whose action causes the integration event to be created, or as language-independent code (LIC) values.

After you create an integration event queue, the Picklist Format field becomes read-only and you cannot change it. If you want to change the picklist format for an integration event queue, including the default queue, then contact Oracle CRM On Demand Customer Care and ask them to change it for you. After Oracle CRM On Demand Customer Care changes the format for the picklist values for a queue, the change applies only to the picklist values in the integration events that are created after the format is changed. Changing the picklist format for a queue does not change the format of the picklist values in any integration events that already exist in the queue.

Content Management

Companies often want to keep track of the products in which their customers express interest and which they subsequently purchase. To help your company's employees track product information, you can set up a product catalog. Setting up the product catalog consists of grouping products under categories (if required) and then setting up the products under each category. Products include recurring or one-time products, services, and training options.

The following sections describe ways in which tracking of products is useful in Oracle CRM On Demand:

Opportunities

A sales representative working on a sales opportunity can create an opportunity record to track the details of a customer's interests, including the potential revenue for the deal. A customer might be interested in several products and might consider purchasing a service contract as well. The sales representative can scroll down to the Products section of the opportunity record to link the product records for each of the items that the customer might buy. For the service contract, billed monthly, the sales representative can also record recurring revenue information. In this way, the opportunity record gives complete information about a potential deal, and allows your company to:

- Track the products belonging to each opportunity

- Calculate revenue streams generated over time based on those products (recurring and non-recurring products)

Assets

Both sales and service professionals find it helpful to know which of your company's products and services a customer has already purchased. In Oracle CRM On Demand, you can track purchased products or assets by linking product records to a customer's account or contact record, or to an opportunity record.

Forecasts

A forecast is a periodic snapshot of sales performance compiled from individual opportunity or product records. An advantage of linking products to opportunity, account, or contact records is that a company can then determine whether to generate forecasts based on product and recurring revenue.

If your company bases its forecasting on product revenue rather than opportunity revenue, your employees can specify which products should be used for the forecast totals.

Click a topic to see step-by-step instructions for the procedures pertaining to Content Management:

- Setting Up Product Categories (on page 1854)
- Setting Up Company Products (on page 1855)
- Setting Up Price Lists for PRM (on page 1857)
- Setting Up Price Lists for Life Sciences (on page 1860)
- Managing Your Company's Attachments (on page 1862)
- Managing Detail Page Images (on page 1864)
- Setting Up Assessment Scripts (on page 1865)

Setting Up Product Categories

If your company's product list is long, it is a good idea to organize products in logical groupings, each with a name that is meaningful at your company. These groupings are called product categories. Categories help you search for a product or set of products because they allow you to sort the list to quickly find what you need. The product categories also allow your employees to quickly identify the correct product to link to their opportunities. For example, an office equipment company might set up these categories: Copiers, Fax Machines, Service, and Supplies.

You can have as many categories and subcategories (children) as you want.

Before you begin:

- To perform the procedures described in this section, your role must include the Manage Content privilege.
- If your product categories have not been defined at your company, determine the categories and subcategories before setting up the information in Oracle CRM On Demand. When entering information, start from the top parent categories, and then add the children categories.

To set up your product categories

1. In the upper right corner of any page, click the Admin global link.
2. In the Content Management section, click the Content Management link.
3. Click the Product Categories link.
4. On the Product Categories List page, do one of the following:
   - To add a category, click New.
   - To update category information, click Edit for the appropriate record.

NOTE: To limit the records displayed on this page (and make it easier to find the existing category), click the drop-down menu in the title bar and change the selection. The drop-down list contains standard lists distributed with the application along with lists you or your managers created.

- To add a child category to an existing category, click the link in the Category Name column, and then click New in the Child Categories section.

5 On the Category Edit page, enter the required information. The Category Name character limit is 100.

6 Save the record.

Setting Up Company Products

Before you begin:

- To perform the procedures described in this section, your role must include the Manage Content privilege.
- If you are grouping products under categories, set up the categories before you define your products.

To allow employees to link products to opportunities, you need to set up your product inventory. When defining the products, mark the ones that you want to be on the list of products that your employees can order from (so that they can link products to their opportunities).

NOTE: You can display an image on the Product Detail page; for example, you might want to display a photograph of the product or the product packaging. For more information, see Displaying Images on Record Detail Pages (on page 70).

To add products

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

2 In the Content Management section, click the Content Management link.

3 In the Product Catalog section, click the Products link.

4 On the Product List page, do one of the following:

   - To add a product, click New.
   - To update product information, click Edit for the required record.

   NOTE: To limit the records displayed on this page (and make it easier to find the existing product), click the drop-down menu in the title bar and change the selection. The drop-down list contains standard lists distributed with the application along with lists you or your managers created.

5 On the Product Edit page, complete the information and save the record.

NOTE: To make the product available to employees (so they can link it to their opportunities), make sure the Orderable check box is selected.

TIP: You cannot delete products. Instead, you need to make the product inactive by clearing the Orderable check box. This removes the product from the list of products that your employees can select.

The following table describes field information for products. Company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table. (For additional information on product fields see Product Fields (on page 584).)

Field	Description
Key Product Information	
Product Category	Specific to Oracle CRM On Demand Financial Services Edition and Oracle CRM On Demand Life Sciences Edition.

Field	Description
Class	Grouping of products to which the product belongs. Specific to Oracle CRM On Demand Life Sciences Edition.
Price Type	Specific to Oracle CRM On Demand Life Sciences Edition.
Parent Product	Specific to Oracle CRM On Demand Life Sciences Edition.
Product Type	Specific to Oracle CRM On Demand Automotive Edition and Oracle CRM On Demand Life Sciences Edition. If you are defining an Automotive product, the Product Type field must be set to Vehicle. If you are defining a Sample Drop product (where Type is set to Sample), the Product Type field must be set to Sample or remain empty.
Therapeutic Class	Specific to Oracle CRM On Demand Life Sciences Edition.
Part #	The part number for the product.
Orderable	Select this check box so that the product can be linked to any other record, appears in the Product Lookup window, in lists, and is available in Action bar search and advanced search. If this check box is deselected, the product appears when using the Action bar search or the advanced search only.
Type	The type of product, which can be one of the following: Product, Service, Training, Market, Competitor, Detail, Sample, or Promotional Item. For Oracle CRM On Demand Life Sciences Edition, you must select the following values for Type: - Detail, if the item is a Product Detail - Sample, if the item is a Sample Drop - Promotional Item, if the item is a Promotional Item Drop Selecting these types, filters the type of products (product details, samples, or promotional items) that are visible in the sales representative's Sample Drop, Product Detail or Promotional Items pick lists. **NOTE:** If the Type is Sample, the Product Type field must also be set to Sample or remain empty.
Sub Type	Specific to Oracle CRM On Demand Life Sciences Edition.
Status	The status of the product.
Revision	Specific to Oracle CRM On Demand Life Sciences Edition.
Serialized	Specific to Oracle CRM On Demand Life Sciences Edition.

Field	Description
Lot Number Tracking	Specific to Oracle CRM On Demand Life Sciences Edition.
Controlled	Indicator that the product is controlled. Specific to Oracle CRM On Demand Life Sciences Edition.
Additional Information	
Description	Additional information about the product. This field has a limit of 255 characters.

Setting Up Price Lists for PRM

Brand owners can maintain and publish price lists for their products, so that partners can use them when creating special pricing requests. Brand owner administrators can create multiple price lists and can associate each account or partner organization with one of them. Multiple products can be assigned to a price list and given a specific price.

On a special pricing request, the customer price list determines the Manufacturer's Suggested Retail Price (MSRP) of the products, and the owner partner price list determines the reseller purchase cost. Maintaining these prices in price lists streamlines administration and facilitates the special pricing process.

Before you begin: To perform the procedures described in this topic, your role must include the Manage Content privilege.

NOTE: Access to price lists is restricted to brand owner administrators who have the Manage PRM Access privilege in their role.

To set up a price list

1. In the upper-right corner of any page, click the Admin global link.
2. In the Content Management section, click Content Management.
3. In the Product Catalog section, click Price Lists.
4. On the Price List List page, do one of the following:
   - To add a price list, click New.
   - To update price list information, click the Edit link for the price list.

     NOTE: To limit the records displayed on this page, click the menu in the title bar, and change the selection. The list contains the standard lists distributed with Oracle CRM On Demand along with the lists that you or your managers created.
5. On the Price List Edit page, complete the information.

The following table describes the fields for price lists. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Key Price List Information	
Price List Name	The name of the price list.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Effective From</td><td>The date that begins the effective period during which the price list is valid.</td></tr>
<tr><td>Effective To</td><td>The date that ends the effective period during which the price list is valid. If this field is empty, then the price list is effective indefinitely.</td></tr>
<tr><td>Type</td><td>The type of price list. The following values are available by default:
DIST COST. The distributors' costs, which are the original stocking costs that the partner or reseller must pay to purchase products from the brand owner.
MSRP. The Manufacturer's Suggested Retail Prices, which are the prices that the brand owner recommends for products sold to customers.
Your company can add values to the picklist for the Type field. However, the values provided by default must not be changed. If they are changed, then the corresponding fields on the special pricing requests will not be populated using the price lists.</td></tr>
<tr><td>Status</td><td>The current status of the price list (In Progress or Published). The default value for all new price lists is In Progress. When a price list can be made available to users, change its status to Published.</td></tr>
<tr><td>Currency</td><td>The type of currency used by the price list. All prices in a price list are in the same currency, which is defined when the price list is created. When you save the new price list record, this field becomes read-only.</td></tr>
<tr><td colspan="2">Additional Information</td></tr>
<tr><td>Created</td><td>The name of the person who created the price list, as well as the date and time when the price list was created.</td></tr>
<tr><td>Modified</td><td>The name of the person who last modified the price list, as well as the date and time when the price list was most recently modified.</td></tr>
<tr><td>Description</td><td>Additional information about the price list. This field has a limit of 2,000 characters.</td></tr>
</table>

Publishing Price Lists

After a price list has been updated by the administrator, it can be published to users and used when creating special pricing requests.

To publish a price list

1. In the upper-right corner of any page, click the Admin global link.
2. In the Content Management section, click Content Management.
3. In the Product Catalog section, click Price Lists.
4. Click the Edit link for the price list that you want to publish.
5. On the Price List Edit page, choose Published from the Status menu.
6. Click Save.

When you change the status to Published, the following occurs:

- The price list can be associated with an account or partner organization.
- If the price list has been associated with a customer or partner on a special pricing request, then when a special pricing product is created, the price list is used to populate the Manufacturer's Suggested Retail Price (MSRP) field and the Purchase Cost field on the special pricing product.

  The price list associated with the end customer on the special pricing request is used for the MSRP field and the price list associated with the owner partner on the special pricing request is used for the Purchase Cost field. The following conditions must also be met:

  - The price list associated with the end customer is of type MSRP and the price list associated with the owner partner is of type DIST COST.
  - The status of the price list is Published.
  - The product that is added on the special pricing request exists on the price list.
  - The start date of the special pricing request falls between the Effective From date and the Effective To date of the price list and between the Effective From date and the Effective To date of the price list line item.

Adding Price List Line Items

After creating a price list you can add products as line items for the price list. A price list can contain multiple products, but each product can be listed only one time in any given price list.

To add a price list line item

1. In the upper-right corner of any page, click the Admin global link.
2. In the Content Management section, click Content Management.
3. In the Product Catalog section, click Price Lists.
4. Click the name of the price list that you want to update.
5. On the Price List Detail page, in the Price List Line Items related information section, click Add.
6. On the Price List Line Item Edit page, complete the information.

NOTE: You can also access the Price List Line Item Edit page from a Product Edit page.

The following table describes the fields for price list line items. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Key Price List Information	
Price List	The name of the price list.
Product	The product for the price list line item.
Effective From	The date that begins the effective period during which the indicated price list line item is valid. This date must be within the Effective From and Effective To dates for the price list.
Effective To	The date that ends the effective period during which the indicated price list line item is valid. If this field is empty, then the price list line item is effective indefinitely.
Price Type	Denotes the type of the price. The current default value is Standard.
List Price	The price for the line item during the indicated effective period.

Field	Description
Additional Information	
Created	The name of the person who created the price list line item, as well as the date and time when the price list line item was created.
Modified	The name of the person who last modified the price list line item, as well as the date and time when the price list line item was most recently modified.
Description	Additional information about the price list line item. This field has a limit of 2,000 characters.

Setting Up Price Lists for Life Sciences

Companies that use Oracle CRM On Demand Life Sciences Edition can create price lists that can be associated with orders. You can associate multiple products with a price list. Each product has a specific price for a particular price list.

To set up price lists for Oracle CRM On Demand Life Sciences Edition, you must have both the Manage Content privilege and the Enable Order Access privilege enabled for your role. To associate price lists with orders, users must have either the Enable Order Access privilege or the Enable Basic Samples Operations privilege enabled for their role.

To add products to the price list, you must be able to access the Price List Line Items related information section on the Price List Detail page. This section is not available on the page by default. Company administrators can create a customized page layout that includes the Price List Line Items related information section and then assign the customized layout to each role that sets up price lists. To assign page layouts for the Price List record type to a user role, the company administrator must have the Manage PRM Access privilege. If the Manage PRM Access privilege is not enabled for your company administrator's role, then contact Oracle CRM On Demand Customer Care.

NOTE: After the Manage PRM Access privilege is enabled for your company administrator's role, the record types that are used for Oracle CRM On Demand for Partner Relationship Management are available in Oracle CRM On Demand. For more information about these record types, see the Partner Relationship Management and High Tech section of the online help. Price lists that have the Published value in the Status field can be associated with some of the record types that are used in Oracle CRM On Demand for Partner Relationship Management. Any price list can be associated with an order record, regardless of the value in the Status field of the price list.

To set up a price list

1. In the upper-right corner of any page, click the Admin global link.
2. In the Content Management section, click Content Management.
3. In the Product Catalog section, click Price Lists.
4. On the Price List List page, do one of the following:
   - To add a price list, click New.
   - To update price list information, click the Edit link for the price list.
5. On the Price List Edit page, complete the information.

The following table describes the fields for price lists. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td colspan="2">Key Price List Information</td></tr>
<tr><td>Price List Name</td><td>The name of the price list.</td></tr>
<tr><td>Effective From</td><td>The date that begins the effective period during which the price list is valid.</td></tr>
<tr><td>Effective To</td><td>The date that ends the effective period during which the price list is valid. If this field is empty, then the price list is effective indefinitely.</td></tr>
<tr><td>Type</td><td>The type of price list. The following values are available by default:
■ DIST COST. The costs for the pharmaceutical company, which are the original stocking costs that the physician or pharmacy must pay to purchase products from the pharmaceutical company.
■ MSRP. The Manufacturer’s Suggested Retail Prices, which are the prices that the pharmaceutical company recommends for products sold to customers.
Your company can add values to the picklist for the Type field.</td></tr>
<tr><td>Status</td><td>The current status of the price list. The values available by default are In Progress and Published. The default value for all new price lists is In Progress.
NOTE: The price list is available in the Lookup window for the Price List field on order records regardless of the value in the Status field of the price list.</td></tr>
<tr><td>Currency</td><td>The type of currency used by the price list. All prices in a price list are in the same currency, which is defined when the price list is created. When you save the new price list record, this field becomes read-only and cannot be updated.</td></tr>
<tr><td colspan="2">Additional Information</td></tr>
<tr><td>Created</td><td>The name of the person who created the price list, as well as the date and time when the price list was created.</td></tr>
<tr><td>Modified</td><td>The name of the person who last modified the price list, as well as the date and time when the price list was most recently modified.</td></tr>
<tr><td>Description</td><td>Additional information about the price list. This field has a limit of 2,000 characters.</td></tr>
</table>

Adding Price List Line Items

After creating a price list, you can add products as line items for the price list. A price list can contain multiple products, but each product can be listed only one time in any given price list.

To add a price list line item

1. In the upper-right corner of any page, click the Admin global link.
2. In the Content Management section, click Content Management.
3. In the Product Catalog section, click Price Lists.
4. Click the name of the price list that you want to update.

5 On the Price List Detail page, in the Price List Line Items related information section, click Add.

6 On the Price List Line Item Edit page, complete the information.

The following table describes the fields for price list line items. A company administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Key Price List Information	
Price List	The name of the price list.
Product	The product for the price list line item.
Effective From	The date that begins the effective period during which the indicated price list line item is valid. This date must be within the Effective From and Effective To dates for the price list.
Effective To	The date that ends the effective period during which the indicated price list line item is valid. If this field is empty, then the price list line item is effective indefinitely.
Product Part #	The product part number is defined as part of the product setup. For products in Oracle CRM On Demand Life Sciences Edition, the part number is typically made up of the product name and the strength or dosage of the product.
Price Type	Denotes the type of the price. The current default value is Standard.
List Price	The price for the line item during the indicated effective period.
Additional Information	
Created	The name of the person who created the price list line item, as well as the date and time when the price list line item was created.
Modified	The name of the person who last modified the price list line item, as well as the date and time when the price list line item was most recently modified.
Description	Additional information about the price list line item. This field has a limit of 2,000 characters.

Managing Your Company's Attachments

From the Content Management section of the Admin Homepage, you can access the Manage Attachments page, where you can review attachments.

NOTE: The Manage Attachments page shows only the attachments that are linked to parent records through the preconfigured Attachments related item. The Manage Attachments page does not show attachments that are linked to parent records through custom attachment record types, or attachments that are added to records through attachment fields. For a list of the record types that support the preconfigured Attachments related item, see About Attachment Configurations (on page 1356).

Reviewing attachments helps you to determine:

- Which file attachments are taking up large amounts of storage space
- Which files have been attached more than once

  If a file has been attached more than once, consider placing the attachment on a common shared location and directing users to replace attachments with the path to those files.
- Which users need to be reminded of the storage issues for large attachments

Before you begin. To perform the procedures for managing attachments, your role must include the Manage Content - Manage Attachments and Detail Page Images privilege.

To review attachments

1. In the upper right corner of any page, click the Admin global link.
2. In the Content Management section, click the Content Management link.
3. In the Manage Attachments and Images section, click the Manage Attachments link.
4. Do any of the following:

Task	Action
View an attachment	Choose View in the record-level menu for the attachment.
Delete an attachment	Choose Delete in the record-level menu for the attachment. The deleted file or URL is moved to the Deleted Items page and is permanently removed from the database after 30 days. If you need to delete multiple attachments, you can use the Batch Delete command. For information on Batch Delete, see Creating and Using Attachment Lists below.
Replace an attachment	To replace a file with a different one, choose Replace in the record-level menu for the attachment. On the Edit page, browse to the new file and save the record. To replace a URL with a different one, click Replace. On the Edit page, enter the required information and save the record. For complete instructions, see Attaching Files and URLs to Records (on page 163).
Display the record count	To display the quantity of attachment records that meet the current list filter or other specifications, click the Menu button and select Record Count.

Creating and Using Attachment Lists

You can restrict the current display of records to show only records that meet specific criteria (such as file size greater than a specific value, attachments of a specific type, and so on). You can save these specifications as a named list that you can reuse whenever you display the Manage Attachments page.

With lists, you can perform the following tasks:

Task	Action
Create a new list	To create a new list, click the Menu button and select Create New List. For more information, see Working with Lists. (see Working with Lists on page 125)
Show List Filter	To display the current list filter criteria, click the Menu button and select Show List Filter. The View List page shows the current criteria in the Filter Information tab, and the selected fields in the Selected Fields tab.
Refine List	To refine your current list criteria, click the Menu button and select Refine List. For more information, see Working with Lists. (see Working with Lists on page 125)
Save List	When your list definition is complete, you can save it for future reuse.Click the Menu button and select Save List. In the Refine List page, enter a list name and click Save and Run.
Export List	You can export the currently displayed list of attachments to a file. Click the Menu button and select Export List. For more information, see Exporting Records in Lists (on page 143).
Batch Delete	To delete all attachments shown in the list, click the Menu button and select Batch Delete. When prompted, click OK. For more information, see Batch Delete and Restore Queue Page (on page 1844).

Managing Detail Page Images

From the Content Management section of the Admin Homepage, you can access the Manage Detail Page Images page, where you can review images that are associated with detail pages.

The Manage Detail Page Images page shows only images that are displayed on detail pages and provides a central location for managing all such images. Alternatively, you can visit detail pages and manage the images individually. Reviewing images helps you to determine which images are taking up large amounts of storage space.

Before you begin. To perform the procedures for managing detail page images, your role must include the following privileges in the Admin: Content Management category:

- Manage Content
- Manage Content - Manage Attachments and Detail Page Images

To manage detail page images

1. In the upper right corner of any page, click the Admin global link.
2. In the Content Management section, click the Content Management link.
3. In the Manage Attachments and Images section, click the Manage Detail Page Images link.
4. The Manage Detail Page Images page opens. It has the following columns:
   - **Image.** A thumbnail of the image.
   - **Size (in Bytes)**. The size of the image stored in Oracle CRM On Demand.
   - **Created By.** The user name of the user that added the image.

- **Modified By**. The user name of the user that last modified the image.
- **Last Modified.** The date and time the image was last modified.
- **Object Type.** The record type to which the image is associated.
- **Object Id.** The row ID of the record to which the image is associated.

5 Do any of the following:

- To delete an image, select Delete in the record-level menu for the image. Then follow the prompts.
- To download an image, select Download in the record-level menu for the image. Then follow the prompts.
- To replace an image, select Replace in the record-level menu for the image. Then follow the prompts.
- To limit the images displayed in the list, click the drop-down menu and change the selection.

  The drop-down list contains standard lists distributed with the application.
- To export a list, click Menu and select Export List. For more information, see Exporting Records in Lists (on page 143).
- To create a new list, click Create New List. For more information, see Working with Lists. (see Working with Lists on page 125)

Setting Up Assessment Scripts

You can set up assessment scripts to help users to follow consistent processes when collecting data and making decisions. The assessment scripts can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction, and so on. The assessment responses are scored, assigned a weight, and compared with a specified threshold to determine the appropriate outcome or course of action.

With Oracle CRM On Demand, you can set up assessment scripts that allow your company to:

- Capture activity information for a sales call, task, or appointment.
- Conduct satisfaction surveys with customers.
- Gather responses to business plans.
- Automate the qualification of leads.
- Gather responses to objectives.
- Assess opportunities (by enforcing a sales methodology at your company).
- Conduct customer satisfaction surveys for contact and service request records.
- Use call scripts for service request records.

To find out more about assessment scripts, or to see step-by-step instructions for creating assessment scripts, see the following:

- About Assessment Scripts (on page 1865)
- Creating Assessment Scripts (on page 1868)

About Assessment Scripts

An *assessment script* is a series of questions that helps users to collect customer data. Assessment scripts can be used to qualify leads, assess opportunities, guide customer service interactions, survey customer satisfaction, capture activity information, and so on.

You can score customer answers, assign different weights to questions, and set thresholds for establishing decisions. In addition, you can map fields used during the assessment to the parent record and, later, run reports and analyses, based on those fields.

Before you begin: To perform the procedures described in this topic, your role must include the Manage Content privilege.

How Are Assessment Scripts Used?

The process of using an assessment script is as follows:

1. The user launches an assessment script from a record detail page. The appropriate assessment scripts (determined by specified record field values) are listed on the record detail page. The user can also search for other assessment scripts, if necessary.
2. Working through the assessment questions, the user gathers critical customer information, such as details about the quality of a sales lead, and selects the correct response for each question from a drop-down list of choices.
3. Based on the responses, a score is automatically calculated, and the record is updated. For example, a lead is classified as qualified or rejected.
4. The answers to the questions are mapped as field values in the record, so that the answers are easily accessible, and available for reporting.
5. The completed assessments are stored and can be accessed in a related records section of the parent record.

Which Type of Assessment Script Should You Create?

You can set up a number of different types of assessment scripts. Each script type is suitable for a specific task. Use the script types as follows:

- **Account Survey:** Use this type to conduct surveys with individual customers.
- **Activity Assessment:** Use this type to capture valuable contact and account call information.
- **Business Plan Assessment:** Use this type to allow sales representatives to gather information that will help to determine the effectiveness of business plans.
- **Contact Script:** Use this type to conduct customer satisfaction surveys with individual contacts.
- **Lead Qualification:** Use this type to help sales representatives to identify the qualified leads. Using a script for this task reduces the need for training and enforces consistent lead qualification.

  NOTE: A lead qualification script might fail to set the Status field on the lead to Qualified if certain fields on the lead are not populated. For more information, see Required Fields for Lead Qualification (on page 252).

- **Objective Assessment:** Use this type to allow sales representatives to gather information that will help to determine the effectiveness of objectives.
- **Opportunity Assessment:** Use this type to embed sales methodologies and help sales representatives to assess the opportunities so that they can adjust their sales strategies as they work on deals.
- **Service Request-Script:** Use this type to help service representatives to assess service requests; for example, to determine the priority or the escalation path for the request. Using a script for this task reduces the need for training and enforces consistent customer service.
- **Service Request-Survey:** Use this type to administer customer satisfaction surveys (that are linked to a specific service event.)

Each type of assessment is linked to a corresponding record type: Appointment, Sales Call, or Task; Account; Business Plan; Contact; Lead; Objective; Opportunity; or Service Request. If necessary, you can create multiple assessments of each type and present the appropriate script to the user. The script is based on the specified record criteria.

Process of Creating Assessment Scripts

You must complete several tasks to set up an assessment script.

1. Customize the assessment script filters.

   The filters allow you to define the criteria used to identify the appropriate assessment for a task, based on the specified record field values.

   For example, a lead qualification assessment script might be set up with these filters:

   - Account Tier = Gold

- Segment = Large
- Region = West

Then, when a user launches an assessment script from a lead record with the corresponding values, the correct lead qualification script is listed.

All assessment script types use the same four filter fields, each with a defined picklist of values. To customize the filters, you must:

a. Enter the filter field display names and picklist values for every record type for which you want to create an assessment script.

   For more information, see Creating Assessment Scripts (on page 1868).

b. Add the filter fields to the page layouts for every record type for which you want to create an assessment script.

2. Create the assessment script:

   a. Enter the script details.
   b. Add criteria (questions) to the script.
   c. Add a list of potential answers for each question.

   For more information on these steps, see Creating Assessment Scripts (on page 1868).

3. Give users access to the script:

   a. For each user role that must use assessment scripts, configure the user role and the access profiles:

      - **To create assessments.** For a user to be able to create assessment scripts, you must give the user's role access to the Assessment record type, which means that the access-level setting for the default and owner access profiles for the user's role must be set to at least Read/Edit for the Assessment record type. Also, the record type access-settings for the role must have the Has Access and Can Create check boxes selected for the Assessment record type.

      - **To view assessments.** For a user to be able to view the details of an assessment, you must give the user’s role read access to the Assessment record type, which means that the access-level setting for the default and owner access profiles for the user's role must be set to at least Read-Only for the Assessment record type. Also, the record type access-settings for the role must have the Has Access and Can Read All Records check boxes selected for the Assessment record type.

      For more information about setting up user roles, see Adding Roles (on page 1396). For more information about setting up access profiles, see Process of Setting Up Access Profiles (on page 1416).

   b. For each record type for which you have created assessment scripts, add the appropriate assessment script section to the displayed information on the record detail page. For more information about customizing page layouts, see Customizing Static Page Layouts (on page 1267).

Example of an Assessment Script

A typical script that a company administrator might want to set up is a Lead Qualification script, which is used to determine whether a lead is to be qualified or rejected.

The following table shows the example values that might be used for such a script.

Script Field	Example Value
Type	Lead Qualification
Threshold Score	50
Outcome Value If Threshold Met	Qualified

Script Field	Example Value
Outcome Value If Threshold Not Met	Disqualified
Field to Map Outcome Value To	Description

Some examples of criteria for the Lead Qualification script are shown in the following table.

Criteria	Weight
What is the current state of your budget?	50
What is driving the timeline for this project?	25
When is it planned to make a decision?	25

Examples of answers and scores for the question "What is the current state of your budget?" are shown in the following table.

Answer	Score
Budget Approved	100
Budget Rejected	0

The score for each criterion is calculated by multiplying the weight of the criterion by the score for the answer, where the weight is a percentage. In this example, if a user chooses the answer Budget Approved, the score for the question is calculated as follows:

(0.5 * 100) = 50

The total score for the script is the sum of the scores for all the criteria. If the final outcome of the script meets or exceeds the threshold defined in the script, the value of the Description field on the Lead Detail page is set to Qualified. If the score falls below the threshold, the value of the field is set to Disqualified.

When assessment scores are calculated, the following rules apply:

- Scores for individual questions are rounded to the nearest single decimal place.
- The overall assessment score is rounded to the nearest whole number.
- Rounding rules are based on standard mathematical rules, so that a decimal value of less than 0.5 is rounded down, while a decimal value of 0.5 or greater is rounded up.

Creating Assessment Scripts

To customize assessment script filters and create an assessment script, follow the steps in this topic.

Before you begin:

- To perform this procedure, your user role must include the Manage Assessments Access privilege and the Manage Content privilege.
- If necessary, customize the picklist values and fields you want to use as part of the assessment criteria. For example, you can add custom fields to display information collected during the customer interview. When you set up the script, you can map the answers to those custom fields.
- Before you start to create your assessment scripts, see About Assessment Scripts (on page 1865).

Be sure to add any new fields to the page layout for that record. For instructions, see Customizing Static Page Layouts (on page 1267).

NOTE: You cannot translate the components of assessment scripts directly in Oracle CRM On Demand. If you want to use an assessment script in more than one language, you must create a version of the script in each language.

You can use assessment script filters to identify which script is the appropriate one to present to a user for a task, based on specified record criteria. The following procedure describes how to customize assessment script filters.

To customize assessment script filters (optional)

1. In the upper right corner of any page, click the Admin global link.
2. Click the Application Customization link.
3. Under Record Type Setup, click Assessment.
4. Click Assessment Field Setup.
5. Click Edit and edit the Display Name column for each of Filter 1, 2, 3, and 4.
6. For each field, click Edit Picklist and set up the values for the picklist.

   TIP: Keep the default <No Values> value at the top of the picklist options, unless you want to force your employees to select something from the picklist.

7. Save the record.
8. To relabel these fields in the record pages that your employees use, go to the Field Setup section for each of the record types you are running assessment scripts with.

   NOTE: The same picklist values you set up for Assessment Fields are displayed in these other records. However, you can customize the display name for these fields for each record type.

To create an assessment script

1. In the upper right corner of any page, click the Admin global link.
2. Click the Content Management link.
3. Click the Assessment Scripts link.
4. On the Assessment List page, click New Assessment.
5. On the Assessment Edit page, complete the information.

   The following table describes field information for assessments. An administrator can add, relabel, or delete fields, so the fields you see might differ from those in this table.

Field	Description
Name	Limit of 50 characters. Use a descriptive name that includes the purpose of the script. If your company employees use various languages, include the language in the script name.
Type	Determines the record type the script is linked to. The available options are: Account Survey, Activity Assessment, Business Plan Assessment, Contact Script, Lead Qualification, Objective Assessment, Opportunity Assessment, Service Request - Script, and Service Request - Survey.
Active	Only scripts that are active are available to users.

Field	Description
Filter 1, 2, 3, 4	Displays the label that you set up for the assessment category.
Threshold Score (1-100)	Used to calculate the outcome of the scripts. If the score of the script is equal to or higher than the threshold, the outcome is met.
Field to Map Score To	Determines the field to display the score in the parent record.
Outcome Value If Threshold Met	(Optional) Determines the value to display if the outcome is met. For example, if the lead meets the criteria for qualification, this field can display *Qualified.*
Outcome Value If Threshold Not Met	(Optional) Determines the value to display if the threshold is not met. For example, if the lead does not meet the criteria for qualification, this field can display *Rejected*.
Field to Map Outcome Value To	(Optional) Determines the field to display the outcome in the parent record when the script is completed.
Remove Comment Box	Select this check box to remove the ability to add comments when completing an assessment. If this check box is deselected, then a comment box is visible, and you will be able to enter a comment when completing an assessment.
Response Control	Determines the control that will be used for adding responses to assessment criteria. The options are: Drop Down or Radio Button.

NOTE: An assessment script must be active and have at least one criterion defined before it is displayed on the Record Detail page.

6 Click Save.

7 On the Assessment Detail Page, in the Criteria section, click New or Edit.

8 On the Criteria page, complete the information.

The following table describes the fields you complete for the criteria.

Field	Description
Order	Determines the sequence of the questions presented to the user when the user is completing the assessment.
Criteria Name	A short, descriptive name that summarizes the question. The field has a limit is 20 characters.
Question	A question that the user answers. The field has a limit of 50 characters.
Weight	A percentage between 0 and 100 to indicate the importance of the question. The sum of the weights for all questions must equal 100.

Field	Description
Answer Map to Field	Specify a field on the parent record for mapping the answer to the question in the Question field. Mapping answers to the parent record makes the values available in integration, reporting, and lists.

9 On the Assessment Detail Page, click each criterion name and then click the New or Edit button in the Answers section.

10 On each Answers page, complete the information:

Field	Description
Order	Determines the sequence of the answers presented to the user when the user is completing the assessment.
Answer	Enter a valid answer for the user to select for the question. Limit is 30 characters.
Score	The number of points associated with the answer. The score for the selected answer is multiplied by the weight of the associated question to determine the total question/answer score.

11 Save your changes.

NOTE: For each user role that must use assessment scripts, you must configure the user role to provide access to assessment scripts. For information on the settings that are required for the user role, see About Assessment Scripts (on page 1865).

TIP: Be sure each role has a page layout that includes the new fields you added for assessment.

Application Plug-Ins

This topic provides information on administering application plug-ins. Your company administrator must enable any plug-ins available to you. If the Application Plug-In heading does not appear on the Administration page, then no plug-ins have been enabled.

- For information on configuring Oracle Social Engagement and Monitoring, see Configuring Oracle Social Engagement and Monitoring (on page 1871).
- For information on configuring Oracle Social Network, see Configuring Oracle Social Network Integration Settings (on page 1872).
- For information on configuring Oracle Eloqua Engage, see Configuring Email Delivery Using Oracle Eloqua Engage (on page 1874).

Configuring Oracle Social Engagement and Monitoring

Before you can use Oracle Social Engagement and Monitoring you must first configure the feature to enable Oracle CRM On Demand to create contact or service request records that are based on social monitoring.

Note: To configure Oracle Social Engagement and Monitoring, your role must have the Manage Social Engagement and Monitoring Access privilege. To use Oracle Social Engagement and Monitoring, your role must have the Social Engagement and Monitoring Integration privilege.

To configure Oracle Social Engagement and Monitoring record access

1 Navigate to Admin, and then Oracle Social Engagement and Monitoring.

2 Select the boxes for Contact and Service Request, and click Save.

To enable the service request features, your company administrator must add the Oracle Social Engagement and Monitoring fields to the service request page layout for your role. For more information, read Customizing Static Page Layouts (on page 1267).

Process of Integrating Oracle Social Network with Oracle CRM On Demand

If your company uses Oracle Social Network, then you can integrate Oracle Social Network with Oracle CRM On Demand. After you integrate Oracle Social Network with Oracle CRM On Demand, users in your company can share information from records in Oracle CRM On Demand as social objects in Oracle Social Network.

NOTE: Users in Oracle Social Network who are not users in Oracle CRM On Demand can access the social object for a shared record from Oracle CRM On Demand if another user adds them to the social objects in Oracle Social Network. Similarly, users in Oracle CRM On Demand who do not have access to a specific record in Oracle CRM On Demand can access the social object for that record in Oracle Social Network if another user adds them to the social object in Oracle Social Network.

To integrate Oracle Social Network with Oracle CRM On Demand, perform the following tasks:

1 Contact Oracle CRM On Demand Customer Care and ask to have the Manage Oracle Social Network Integration privilege enabled for your company administrator's role.

   After the Manage Oracle Social Network Integration privilege is enabled by Oracle CRM On Demand Customer Care, the Oracle Social Network link becomes available in the Application Plug-Ins section of the Admin Homepage in Oracle CRM On Demand.

2 In Oracle CRM On Demand, configure the Oracle Social Network integration settings, as described in Configuring Oracle Social Network Integration Settings (on page 1872).

3 Configure the page layouts and user roles to allow users to use the Oracle Social Network integration, as follows:

   - Add the Social related information section to the appropriate page layouts for the record types.
   - Enable the Oracle Social Network Integration privilege and make the Social Web tab available for the user roles as necessary.

   NOTE: Users who have personalized a page layout to which you add the Social related information section do not see the Social section on their page layout by default. For information about how personalized page layouts interact with page layouts for roles, see How Personalized Related Information Layouts Interact with Page Layouts for Roles (on page 1318). For information about resetting page layouts to the default layout, see Resetting Personalized Page Layouts (on page 1420).

For more information about integrating Oracle Social Network with Oracle CRM On Demand, see 1802518.1 (Article ID) on My Oracle Support.

Related Topics

See the following topics for related information:

- Customizing Static Page Layouts (on page 1267)
- Adding Roles (on page 1396)

Configuring Oracle Social Network Integration Settings

This topic describes how to configure the settings for integrating Oracle Social Network with Oracle CRM On Demand. As part of the configuration, you specify the record types that are to be available for sharing in Oracle Social Network. The following record types in Oracle CRM On Demand can be shared as social objects in Oracle Social Network:

- Account

- Opportunity
- Service Request

  You can make one or more of these record types available for sharing in Oracle Social Network.

You also specify which fields from each record type are passed to Oracle Social Network. For each record type, you can select up to a maximum of 10 fields for the record in Oracle Social Network, and you can specify the order in which the fields are displayed.

NOTE: When a record is shared in Oracle Social Network, a title is displayed in the heading of the social object for the record in Oracle Social Network. The title that appears in the social object in Oracle Social Network is the same as the title of the record in the record Detail page in Oracle CRM On Demand. The title is not counted as one of the 10 fields that you can select to be displayed in Oracle Social Network.

To configure the Oracle Social Network integration settings, complete the steps in the following procedure. This task is a step in Process of Integrating Oracle Social Network with Oracle CRM On Demand (on page 1872).

Before you begin. To perform the following procedure, you must have the Manage Oracle Social Network Integration privilege in your user role. In addition, you must have the following information:

- The URL for your company's instance of Oracle Social Network
- An integration user ID and integration password for Oracle Social Network

To configure Oracle Social Network integration settings

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Plug-Ins section, click Oracle Social Network to open the Oracle Social Network Administration wizard.
3. In the Oracle Social Network Administration wizard, in Step 1, General Configuration, enter the following information:
   - The URL for your company's Oracle Social Network instance
   - The integration user ID for Oracle Social Network
   - The integration password for Oracle Social Network
4. In Step 2, Record Type Access, do the following for each record type that you want to allow users to share in Oracle Social Network:
   a. Select the Enable in OSN? check box.
   b. Click Field Setup for the record type, and move the fields that you want to appear in the social object in Oracle Social Network from the Available Fields list to the Selected Fields list. You can select up to a total of 10 fields.
   c. In the Selected Fields list, use the up and down arrows to arrange the order in which the fields are to appear in the social object in Oracle Social Network.

      The fields are shown in two columns in the social object in Oracle Social Network. The first field in the Selected Fields list appears at the top left of the social object, the second field appears at the top-right, the third field appears below the first field on the left of the record, and so on.
5. When you finish setting up the record type access and the fields for each record type, click Finish to save your changes.

NOTE: After you configure the Oracle Social Network integration settings, the Social related information section becomes available for each of the record types that you enabled for integration with Oracle Social Network. You can add the Social section to the page layouts for the record type as necessary. The Social section is not added to any page layout by default.

Configuring Email Delivery Using Oracle Eloqua Engage

You can configure Oracle CRM On Demand to send marketing emails to customer contacts and leads using Oracle Eloqua Marketing Cloud Service and its add-on product, Oracle Eloqua Engage. After you complete this configuration, Oracle CRM On Demand users can create these emails from an email template designed for their customer contacts. These users can then send the emails to individual contacts or leads from a Detail page, or to a list of contacts or leads from a List page if you have configured the Allow Sending Engage Emails from Lists setting. All sent emails are logged, activities such as opening and sending emails, and click-throughs are tracked in Oracle Eloqua Engage. For information on Oracle Eloqua Engage, see the Oracle Eloqua Marketing Cloud Service Web site. For information on sending emails, see Sending Marketing Emails Using Oracle Eloqua Engage (on page 303).

NOTE: Your company must purchase the required licenses to use Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage. Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage are both separately licensed products from Oracle CRM On Demand.

Before you begin. You must have an instance of Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage available that you can set up for your company. In addition, your user role must include the following privileges:

- Oracle Eloqua Marketing Cloud Service Integration
- Manage Oracle Eloqua Marketing Cloud Service Integration

If these privileges are not enabled for the administrator's role, then contact Oracle CRM On Demand Customer Care.

To configure email delivery using Oracle Eloqua Engage

1. In the upper right corner of any page, click the Admin global link.
2. In the Application Plug-In section, click the Oracle Eloqua Marketing Cloud Service link.

   NOTE: If your role does not include the Manage Oracle Eloqua Marketing Cloud Service Integration privilege, then the Oracle Eloqua Marketing Cloud Service link is not available on the Admin Homepage.

3. On the Oracle Eloqua Marketing Cloud Service Integration Administration page, under Engage Options, configure the following boxes or fields as required.

Field	Description
Engage URL	The URL for your instance of Oracle Eloqua Marketing Cloud Service and Oracle Eloqua Engage, for example: https://secure.eloqua.com You can get this URL during the Oracle Eloqua Marketing Cloud Service implementation process.
Allow Sending Engage Emails from Lists	Select this field if you want Oracle CRM On Demand to send emails to a list of customer contacts using Oracle Eloqua Engage.

4. Click Save.

Related Topics

See the following topics for related information about marketing emails:

- Sending Marketing Emails Using Oracle Eloqua Engage (on page 303)
- Oracle Eloqua Marketing Cloud Service Web site

Life Sciences Management

Using the Admin global link and the Life Sciences Management section of the Admin Homepage, you can perform the following tasks:

- Manage and delete smart call templates. For more information, see Managing Smart Calls (on page 1875).
- Set up Oracle CRM On Demand Life Sciences Edition related preferences. For more information, see Setting Life Sciences Related Preferences (on page 1878).
- Designate which contacts to sample. For more information, see Authorizing Contacts to Receive Samples (see Authorizing Contacts to Receive Samples on page 1880).
- Set up the automatic submission of sample transactions using workflows. For more information, see Setting Up the Automatic Submission of Sample Transactions (on page 1882).

Managing Smart Calls

You can manage smart calls if your user role has the appropriate access level for the Smart Call record type (either Default or Owner access). You can review, edit, and update the details and line items attached to a smart call from the Manage Smart Call Templates page. After editing, the revised smart call template can be applied as required, and saved as either a public or private template.

Restrictions That Apply to Smart Calls

If you are using smart calls, be aware of the following restrictions:

- Oracle CRM On Demand does not support product allocation filtering for smart calls. If you enable allocation filtering using the Select Enable Filtering of Product Selection by Sales Rep Allocation setting, then allocation filtering rules are not respected for any saved smart call templates. If sales representatives use these templates, then they are not limited to accessing only their allocated products when they use the call related information sections, such as Products Detailed, Promotional Items Dropped, or Samples Dropped.
- Smart calls do not support sample allocation filtering for the Samples Dropped related information section in a Call Detail page. For example, the product selector for Samples Dropped displays only the products that are allocated to the user that are of type Sample and the allocation type of Sample Allocation. However, when this call information is saved as a smart call template, the product selector for Samples Dropped displays all products of type Sample and Promotional Item, and the allocation type of Sample Allocation and Promotional Item Allocation.
- On a Smart Call Detail page, you cannot edit an existing Products Detailed record using the Product link in the Products Detailed Related Information section because clicking the Product link for inline editing results in an exception. To edit an existing Products Detailed record from a Smart Call Detail page, click the Edit button for the record instead of using the Product link for the record.
- The product-blocking rules do not apply to smart call templates. For more information, see About Product Blocking and Smart Call Templates (see About Blocking Products and Smart Call Templates on page 646).

NOTE: You cannot duplicate smart call templates. Each smart call template must be unique.

To manage smart calls

1. In the upper right corner of any page, click the Admin global link.
2. Click the Smart Call Management link.
3. On the Manage Smart Call Templates page:
   - To review the smart call, click the link in the Subject column.
   - To delete the smart call, click Delete in the appropriate row.
   - To edit the details of a smart call, click Edit in the appropriate row.

For information about the fields on the Call Edit page, see Tracking Visits (Sales Calls) to Customers (on page 208).

- To edit a smart call line item, click the link in the Subject column, go to the appropriate section on the Smart Call Detail page, then click Edit next to the appropriate line item.
- To delete a smart call line item, click the link in the Subject column, go to the appropriate section on the Smart Call Detail page, then click Delete next to the appropriate line item.
- To add a new line item to the smart call, click the link in the Subject column.

  For more information about adding line items to a smart call, see the tasks that follow.
- Revised smart call templates can be applied in the normal way and saved as either public or private templates, as described in the following tasks in Tracking Visits (Sales Calls) to Customers (on page 208):
  - To track a visit (sales call) to a customer
  - To save the call information as a template

4 On the Manage Smart Call Templates page, click the Menu button.

The following table describes the tasks that you can perform from the Menu button on the Manage Smart Calls Templates Page.

To do this	Follow these steps
Batch Assign Book	On the Manage Smart Call Templates title bar, click Menu, and select Batch Assign Book. Complete the steps described in Assigning Records to Books (on page 1454).
Refine List	On the Manage Smart Call Templates title bar, click Menu, and select Refine List. Complete the steps described in Creating and Refining Lists (on page 130).
Save List	On the Manage Smart Call Templates title bar, click Menu, and select Save List.
Show List Filter	On the Manage Smart Call Templates title bar, click Menu, and select Show List Filter. Complete the steps described in View List Page (on page 141).
Manage Lists	On the Manage Smart Call Templates title bar, click Menu, and select Manage Lists. Complete the steps for your required task described in Manage Lists Page (on page 140).
Create New Lists	On the Manage Smart Call Templates title bar, click Menu, and select Create New Lists. Complete the steps described in Creating and Refining Lists (on page 130).

The following procedure describes how to link product detailed information to a smart call record.

To link product detailed information to a smart call record

1 On the Smart Call Detail page, scroll down to the Products Detailed section, and click New.

NOTE: If the Products Detailed section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Products Detailed section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

2 On the Product Detailed Edit page, enter the required information.

For more information about the fields on the Product Detailed Edit page, see the following task in Tracking Visits (Sales Calls) to Customers (on page 208): To link product detailed information to a call record.

3 Save the record.

Repeat these steps, as required, to add more Product Detailed line items to the smart call record.

The following procedure describes how to link samples dropped information to a smart call record.

To link samples dropped information to a smart call record

1 On the Smart Call Detail page, scroll down to the Samples Dropped section and click New.

   NOTE: If the Samples Dropped section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Samples Dropped section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

2 On the Samples Dropped Edit page, enter the required information.

   For more information about the fields on the Samples Dropped Edit page, see the following task in Tracking Visits (Sales Calls) to Customers (on page 208): To link samples dropped information to a call record.

3 Save the record.

Repeat these steps, as required, to add more Samples Dropped line items to the smart call record. For additional information on samples dropped, see Dropping Samples During a Sales Call (on page 558).

The following procedure describes how to link promotional items, educational items, or other marketing items to a smart call record.

To link promotional items, educational items, or other marketing items to a smart call record

1 On the Smart Call Detail page, scroll down to the Promotional Items section, and click New.

   NOTE: If the Promotional Items section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Promotional Items section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

2 On the Promotional Item Dropped Edit page, enter the required information.

   For more information about the fields on the Promotional Item Dropped Edit page, see the following task in Tracking Visits (Sales Calls) to Customers (on page 208): To link promotional items, educational items, or other marketing items to a call record.

3 Save the record.

Repeat these steps, as required, to add more Promotional Items line items to the smart call record.

The following procedure describes how to link book information to a smart call record.

To link book information to a smart call record

1 On the Smart Call Detail page, scroll down to the Books section, and click New.

   NOTE: If the Books section is not visible on the Smart Call Detail page, click the Edit Layout link in the upper-right corner of the page, and add the Books section to your page layout. If the section is not available to add to your page layout, contact your company administrator.

2 On the Books page, enter the required information.

   For more information about the fields on the Books Edit page, see Book Fields (on page 1457).

3 Save the record.

Repeat these steps, as required, to add more Book line items to the smart call record.

Setting Life Sciences Related Preferences

As an administrator, you can set up the following preferences for Oracle CRM On Demand Life Sciences Edition on the Life Sciences Related Preferences page:

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

You can update the Life Sciences related preferences by clicking Edit on the Life Sciences Related Preferences page and saving the updates, or by using inline editing to update individual preferences.

Before you begin: Your role must include the Manage Pharmaceutical Access privilege to set Oracle CRM On Demand Life Sciences Edition preferences.

To set Oracle CRM On Demand Life Sciences Edition related preferences

1. Navigate to the Life Sciences Related Preferences administration page by clicking Admin, Other Life Science Related (in the Life Sciences Management section), and then Life Science Related Preferences.
2. Set the following preferences as required:

   In the Life Sciences Preferences section:

   - Generate Call Activity History

     Select this setting to generate the interaction-history data of the call activity for using and displaying in the Oracle CRM On Demand Disconnected Mobile Sales application.

     NOTE: Choose this setting only if you are a licensed user of the Oracle CRM On Demand Disconnected Mobile Sales application.

   - Allow Submission of Future Calls & Sample Transactions

     Select this setting to allow users to submit calls and sample transactions that are dated in the future.

     NOTE: Choose this setting only if you are a licensed user of the Oracle CRM On Demand Disconnected Mobile Sales application.

   In the Define Sample Related Preferences section:

   - Number of Times a Contact Can Be Sampled

     For information on setting this preference, see Setting the Maximum Number of Times Contacts Can be Sampled Without a Valid State License (on page 1879).

   - Enable Filtering of Product Selection by Sales Rep Allocation

     For information on setting this preference, see Setting Up Picklist Filtering Based On the Allocation Records for a Sales Representative (on page 1880).

   - Enable Contact State License Validation

     Select this setting to have Oracle CRM On Demand check the validity of the contact state license for all calls that contain a U.S. address, when a pharmaceutical sales representative submits product samples to drop to a physician or other health care provider. If this setting is selected, then Oracle CRM On Demand validates the following:

     - The state specified in the address of the call is the same as the state specified in the contact's state license.

- The date of the call takes place within the active period of the state license, that is, the expiration of the state license cannot occur prior to the date of the call. If a date is not specified on the contact state license, then Oracle CRM On Demand assumes that the state license is active and valid.

These validation checks apply only to product sample drops and not to other related activities such as detailing products or dropping promotional items, and it applies to all call types: account calls, attendee calls, and contact calls. If Oracle CRM On Demand determines that the state license is invalid, then Oracle CRM On Demand issues an error message and prevents the sample drop. To proceed with the sample drop, the representative must add a valid state medical license to the call.

- Enable Signature Validation

  Select this setting to have Oracle CRM On Demand check whether a signature record exists when a sales representative attempts to drop any product samples during a customer call using the Submit button on the Call Detail page. If no signature record is associated with the call and the Quantity value is a positive value in the Available Samples for Drop or Samples Dropped related information sections on a Call Detail page, then Oracle CRM On Demand displays an error message and does not proceed with call processing when the sales representative submits the call. To proceed with call processing and allow the representative to drop the product samples, the representative must add the signature record for the contact to the call record before resubmitting the call.

Setting the Maximum Number of Times Contacts Can be Sampled Without a Valid State License

Administrators can set the maximum number of times a contact who does not have a valid state license can be sampled. This setting is set at the global level and applies throughout the organization. Configuring this setting ensures the following:

- That sales representatives in the field will not be able to exceed the specified maximum number of times contacts who do not have a valid state license can be sampled.
- That when a contact moves to a different state, the contact can be sampled while waiting for a valid state license. Typically, contacts must wait a few days to receive a valid license when they move to a different state.

Before you begin. To set the maximum number of times contacts can be sampled without a valid state license, your user role must include the Enable Basic Samples Operations privilege.

To set the maximum number of times contacts can be sampled without a valid state license

1. In the upper-right corner of any page, click the Admin global link.
2. In the Life Sciences Management section, click the Other Life Sciences Related link.
3. On the Life Sciences Related Preferences page, click the Life Sciences Related Preferences link.
4. Enter a value in the Number of Times a Contact Can Be Sampled field.

   The default value in this field is -1, which indicates that the maximum number of times contacts can be sampled without a valid state license has not been set and that there will be no impact on current behavior. Setting the value in this field to any negative number will have the same effect.

   Setting the value in this field to a number greater than zero indicates that you are setting the maximum number of times contacts can be sampled without a valid state license and the impact on behavior is as follows:

   - Sales representatives will be able to sample contacts who are waiting for a valid state license x number of times, where *x* is the value in this field, provided that the status of the license is inactive or not null and that the license has not expired.

     NOTE: To distribute samples to a contact, that contact type (for example, physician, pharmacist, nurse practitioner, doctor) must be authorized to receive and sign for samples. For more information, see Authorizing Contacts to Receive Samples (see Authorizing Contacts to Receive Samples on page 1880).

- If a contact moves to a different state, then the contact can be sampled x number of times while waiting for a valid state license, where *x* is the value in this field. For more information, see Contact State License Fields (on page 532).

Related Topics

See the following topics for related information about samples management:

- Authorizing Contacts to Receive Samples (see Authorizing Contacts to Receive Samples on page 1880)
- Sample Transactions (on page 550)
- Managing Sample Transactions (on page 552)
- Sample Transaction Fields (on page 579)

Setting Up Picklist Filtering Based on the Allocation Records for a Sales Representative

Administrators can enable the filtering of picklists for Oracle CRM On Demand Life Sciences Edition items, such as products detailed, promotional items, samples dropped, message plans, and sample requests. When this filtering is set up, Oracle CRM On Demand filters the following picklist items displayed during a customer call (contact call, account call, or attendee call) by a pharmaceutical sales representative. Depending on the sales representative's allocation records, Oracle CRM On Demand applies the filtering to picklist items as follows:

- The products that the sales representative can detail
- The samples that the sales representative can drop
- The promotional items that the sales representative can drop
- The samples that the sales representative can request for a customer

If the filtering is not set up, then Oracle CRM On Demand does not filter these picklists by using the sales representative's allocation records.

Before you begin. To enable the filtering of picklists, your user role must include the Manage Pharmaceutical Access and Manage Company privileges.

To enable picklist filtering based on the allocation records for a sales representative

1. In the upper-right corner of any page, click the Admin global link.
2. In the Life Sciences Management section, click the Other Life Sciences Related link.
3. On the Life Sciences Related Preferences page, click the Life Sciences Related Preferences link.
4. Select Enable Filtering of Product Selection by Sales Rep Allocation.

   By default, this setting is not selected.

Related Topics

See the following topics for related information:

- Dropping Samples During a Sales Call (on page 558)
- Allocations (on page 585)
- Linking Product Detailed Information to Calls (on page 563)
- Linking Samples Dropped Information to Calls (on page 566)
- Linking Promotional Item Information to Calls (on page 568)
- Linking Sample Request Information to Calls (on page 570)

Authorizing Contacts to Receive Samples

Sales representatives cannot distribute samples to any contact. They can distribute samples only to contacts who are authorized to receive and sign for samples. Administrators control this ability by designating which contact types can be sampled. If a sales representative tries to distribute samples to a contact who is not authorized to receive and sign for samples, then an error message similar to the following is displayed: Contact cannot be sampled.

Before you begin. To authorize contacts to receive samples, you must first create a custom field named Can Be Sampled of type picklist and with the values Yes and No.

To authorize contacts to receive samples

1. In the upper-right corner of any page, click the Admin global link.
2. In the Application Customization section, click Application Customization.
3. In the Record Type Setup section, click the Contact link.
4. In the Cascading Picklists section, click the Contact Cascading Picklist link.
5. On the Contacts Cascading Picklists page, click Edit next to the following cascading picklist definition.

Parent Picklist	Related Picklist
Contact Type	Can Be Sampled

6. Go to Step 2 of the Cascading Picklists Wizard, and set the Related Picklist Displayed Value to No for each contact (or Parent Picklist Available Value) that you do not want authorized to receive and sign for samples.

   NOTE: The Related Picklist Displayed Value for each contact (Parent Picklist Available Value) is set to Yes by default, which means that all contacts can be sampled by default.

   For example, in the following table, the following contacts are authorized to receive and sign for samples: Hospital Executive, Lab Technician, Nurse Practitioner, Pharmacist, and Physician.

Parent Picklist Available Value	Related Picklist Displayed Value
Prospect	No
Customer	No
Partner	No
Hospital Executive	Yes
Lab Technician	Yes
Nurse Practitioner	Yes
Pharmacist	Yes
Physician	Yes
Physician Investigator	No
Research Nurse	No
Research Pharmacist	No
Research Lab Technician	No

For more information about cascading picklists, see Defining Cascading Picklists (on page 1292).

Related Topics

See the following topics for related information about samples management:

- Setting the Maximum Number of Times Contacts Can be Sampled Without a Valid State License (on page 1879)
- Sample Transactions (on page 550)
- Managing Sample Transactions (on page 552)
- Sample Transaction Fields (on page 579)

Setting Up the Automatic Submission of Sample Transactions

This topic describes how to use the workflow functionality in Oracle CRM On Demand to automatically submit sample transactions for processing.

Before you begin. Review the information in About the Automatic Submission of Sample Transactions (on page 1883).

To set up the automatic submission of sample transactions

1. Determine which fields on the sample transactions that you will use in the condition on the workflow rules.

   For example, you might decide to use the setting in a check box field on the sample transaction record type as the criterion for determining whether a record must be submitted. In the workflow rule, you can specify that if the check box is selected on a record, then the workflow submits the record. You can use an existing check box field, or you might want to set up a custom check box field and give it a name, such as Mark for Submit. For more information on setting up custom fields, see the sections on Field Management and Page Layout Management in the table in Record Type Application Customization Page (on page 1199).

2. Set up the necessary workflow rules for the Sample Transaction record type.

   You can set up as many workflow rules as you want. It is likely that you will want to set up a workflow rule with the When Modified Record Saved trigger event to automatically submit the sample transaction records that are modified.

   NOTE: While configuring the workflow rule, you must also include a condition to check whether the Status field is set to a value of *In Progress*. This condition is required so that when the Submit action runs successfully, the action changes the Status field of the Sample Transaction record, which is a modification action that calls this workflow again.

   The following is an example of a minimal rule condition:

   ```
   [<bMark_for_Submit_ITAG>]="Y" AND [<TransactionStatus>]="In Progress" AND
   ExcludeChannel("Online")
   ```

   In this example, Mark for Submit is a custom field, and ExcludeChannel is an optional condition that allows you to restrict the trigger so that the workflow becomes active only for an import, and not when the Submit Call button is used in the UI. If you receive any errors when this workflow action is triggered, see Viewing Error Instances in the Workflow Error Monitor (on page 1552).

   For information about setting up workflow rules, see Creating Workflow Rules (on page 1511).

3. In each of the workflow rules, specify the condition that must be met for the actions on the workflow to be performed.

   For example, you can specify that if a certain check box field on the record is selected, then the actions on the workflow rule must be performed.

NOTE: If you want to prevent the workflow rules from submitting records that are created or updated through the user interface, then set up the necessary restriction in the conditions on your workflow rules. For more information, see Restricting Workflow Rules to Specific Channels or Roles (on page 1528).

4 Create the necessary Submit workflow action on each of your workflow rules.

For more information on the Submit workflow action, see the information on workflow actions for Oracle CRM On Demand Life Sciences Edition in About Workflow Actions (on page 1500).

NOTE: The Submit action must be preceded by a Wait action with a non-zero wait value. Using a non-zero wait renders the workflow action as an asynchronous action. An asynchronous action is recommended for overall application performance, especially if you are importing and submitting a large set of sample transaction records.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

About the Automatic Submission of Sample Transactions

You can set up workflow rules to automatically submit sample transactions so that you do not have to open each record individually to submit sample transactions. Using workflow rules to submit a set of sample transaction records is helpful if you want to simultaneously submit a set of records that you create or update through Web services or through the Import Assistant. For example, when you send new inventory from the warehouse to your sales representatives, you might want to create a large number of sample transactions of type Transfer Out through the Import Assistant, and then submit them.

You can set up a workflow rule that is triggered every time a sample transaction record is updated, and a workflow action on that rule that submits the record automatically if a field on the record is set to a value that you specify in the condition on the workflow rule. For example, you can do the following:

1. Import a set of sample transaction records.
2. Import the transaction item records for the sample transactions imported in step 1.
3. Reimport the set of sample transaction records from step 1 with the trigger field set to the submit trigger value, for example, Mark for Submit set to Y.

NOTE: You must import all corresponding sample transaction items before you submit the sample transactions using the workflow rule.

If you want to prevent the workflow rules from submitting records that are created or updated through the user interface, then set up the necessary restriction in the conditions on your workflow rules. For more information, see Restricting Workflow Rules to Specific Channels or Roles (on page 1528).

When you use a workflow to submit imported records, the following happens:

- Any errors for the workflow submit action do not prevent the sample transaction records from being imported, created, or updated.
- Changes made to the inventory counts are reflected in the Oracle CRM On Demand Disconnected Mobile Sales application.

Oracle CRM On Demand Desktop

Oracle CRM On Demand Desktop allows users to synchronize their Oracle CRM On Demand records with Microsoft Outlook. In the Desktop Integration Administration section of the Admin Homepage, you can click the Oracle CRM On Demand Desktop link to go to a page that enables you to set up this software for distribution to your users. You can do the following:

- Verify that your system meets the system requirements for Oracle CRM On Demand before you install Oracle CRM On Demand Desktop.
- Manage the customization packages available to Oracle CRM On Demand Desktop users, see Administering Customization Packages (on page 1884).
- Download files from Oracle Software Delivery Cloud, which enable you to customize and deploy the Oracle CRM On Demand Desktop application.
- Set the download location for the Oracle CRM On Demand Desktop installer, see Setting Oracle CRM On Demand Desktop Installer Version Locations (on page 1885).

For more information about installing, configuring, and deploying Oracle CRM On Demand Desktop, see <*CRMDesktopAdmin*>. For more information about customizing Oracle CRM On Demand Desktop, see *Oracle CRM On Demand Desktop Customization Guide*.

NOTE: An Oracle CRM On Demand Desktop Lite product is available in addition to the full Oracle CRM On Demand Desktop product. For more information about Oracle CRM On Demand Desktop Lite, see <*CRMDesktopAdmin*>.

Administering Customization Packages

A *customization package* is a collection of XML metadata files and JavaScript files that Oracle CRM On Demand Desktop associates with a particular role. The metadata files customize an Oracle CRM On Demand Desktop deployment. For example, you can perform the following kinds of customization: you can add or remove the fields that Oracle CRM On Demand Desktop synchronizes or change the layout of custom forms. For more information about customization packages, see *Oracle CRM On Demand Desktop Administration Guide*.

NOTE: Oracle CRM On Demand Desktop Lite does not support customization packages.

In the Package List page you can add new customization packages, and copy, edit, and delete existing packages.

Publishing Customization Packages

To make a customization package active and available to Oracle CRM On Demand Desktop users, you must publish the package.

Package records become read-only when they are published, and the value in the Status field changes from Unpublished to Published. Only one customization package can be active for a client version at any time. Therefore, if you try to publish a package for a role with a start date that overlaps with an existing customization package for the same role, then an error message is displayed. However, a user with a specific role can have separate packages published for different client versions.

If it is necessary to change a metadata file in a package, then you must unpublish the package, attach the updated package file, and publish the updated package.

TIP: Because users with a specified role will not be able to download their package file while the record has the Unpublished status, it is recommended that you specify an end date for the currently active package and create a new package record when changes must be made. This action ensures that a package is always available to new users and also allows for more accurate version control and tracking.

Before you begin. To administer customization packages, your role must include the Manage CRM Desktop Access privilege.

To add a customization package

1 In the upper-right corner of any page, click the Admin global link.
2 In the Oracle CRM On Demand Desktop section, click Oracle CRM On Demand Desktop.
3 Click Administer Customization Packages.
4 On the Package List page, click the New Package button.
5 On the Package Edit page, complete the following fields.

Field	Comments
Package Name	Enter a name. It is recommended that you name packages according to the user role.
User Role	Select the role associated with the package.
Comments	Enter comments for the package.
Attachment	Click the attachment icon, and select the package file.
Start Date	Select a start date for the package if you require a date other than today's date.
End Date	If required, select an end date for the package. Published packages without a defined end date are considered to be active indefinitely. Therefore, you must define an end date to deactivate a package record and allow a new package to be published for a role.
Client Version	Version of the Oracle CRM On Demand Desktop client supported for this package.

6 Click Save.

Alternatively you can copy an existing package and change the details to your requirements.

To publish or unpublish a package

1 In the upper-right corner of any page, click the Admin global link.
2 In the Oracle CRM On Demand Desktop section, click Oracle CRM On Demand Desktop.
3 Click Administer Customization Packages.
4 On the Package List page, click the name of the package.
5 Click the Publish button or the Unpublish button as required.

   When you publish a package, a value is generated in the Hash Value field. When you unpublish a package, the Hash Value field is cleared.

Setting Oracle CRM On Demand Desktop Installer Version Locations

In the Installer Locations screen, you can specify the Oracle CRM On Demand Desktop 32-bit or 64-bit installer download location for one or more versions by entering the URL for the installer EXE files. The specified URL can be any location on your network. For more information, see <*CRMDesktopAdmin*>.

Before you begin. To set the Oracle CRM On Demand Desktop installer version location, your role must include the Manage CRM Desktop Access privilege.

Administrators must obtain these installers from Oracle Software Delivery Cloud first.

To set the Oracle CRM On Demand Desktop installer version location

1. In the upper-right corner of any page, click the Admin global link.
2. In the Oracle CRM On Demand Desktop section, click Oracle CRM On Demand Desktop.
3. Click the Download Location link.
4. In the Installer Locations screen, do the following:
   a. For each version for which you want to configure a download location, enter the URL for the EXE files in the URL field next to the version.
   b. Click Save.

After setting the Oracle CRM On Demand Desktop installer version location, end users can install Oracle CRM On Demand Desktop by navigating to My Setup, Data & Integration Tools, then the Oracle CRM On Demand Desktop page where they can download the EXE file. For more information, see Installing Oracle CRM On Demand Desktop (on page 1886).

Installing Oracle CRM On Demand Desktop

On the Oracle CRM On Demand Desktop page, you can click the Download Oracle CRM On Demand Desktop link to install Oracle CRM On Demand Desktop.

Before you begin. Check that you have the required software and hardware and software to run Oracle CRM On Demand Desktop, see Oracle CRM On Demand Web site. For information about installing, configuring, and deploying Oracle CRM On Demand Desktop, see <*CRMDesktopAdmin*>.

To install Oracle CRM On Demand Desktop, your role must include the Enable CRM Desktop Access privilege.

NOTE: The steps in this topic require that your system administrator has configured the installer locations. For more information, see Setting Oracle CRM On Demand Desktop Installer Version Locations (on page 1885).

To install Oracle CRM On Demand Desktop

1. In the upper-right corner of any page, click the My Setup global link.
2. On the Personal Homepage, click the Data & Integration Tools link.
3. On the Data & Integration Tools page, click the Oracle CRM On Demand Desktop link.
4. On the Oracle CRM On Demand Desktop page, select the installer, and then click the Download Oracle CRM On Demand Desktop link.
5. On the second Oracle CRM On Demand Desktop page, read the additional information, and then click the Download Oracle CRM On Demand Desktop link.
6. In the window, do one of the following:
   - Click Save to copy the Oracle CRM On Demand Desktop EXE file to your hard drive to install Oracle CRM On Demand Desktop while you are offline. (Recommended)
   - Click Run to begin the installation. You must stay connected to the Internet to complete the installation.
7. Follow the instructions to complete the installation.

Expression Builder

Click a topic to see information about Oracle On Demand Expression Builder (Expression Builder) and how to use it:

About Expression Builder

Oracle On Demand Expression Builder (Expression Builder) is a tool for implementing business rules using expressions. An expression is a valid combination of one or more operators, functions, fields, and literals that can be evaluated by Oracle CRM On Demand.

Expression Builder is used in the following areas in Oracle CRM On Demand:

- Advanced field management, in the following contexts:
  - Configuring field validation properties on a field
  - Specifying default field values
  - Configuring concatenated fields

  When defining field level validations and default field values, a company administrator can create flexible expressions to cover a variety of business rules. For more information on field validation and default values, see About Field Management (on page 1201). For concatenated fields, you can use expressions to determine the behavior of the fields and text within the concatenated field.
- Workflow rules and workflow actions.

  From the Workflow pages, a company administrator can set up workflow rules that are evaluated when a record is updated, created, or deleted. Expressions are used to define both the conditions on the rules, and the actions that are executed by the rules. For more information about workflow rules, see About Workflow Rules (on page 1491).

NOTE: Expression Builder can verify the syntax of an expression in most cases. However, it cannot evaluate or verify an expression for mathematical, logical, or semantic accuracy.

Related Topics

See the following topics for related Expression Builder information:

- Using Expression Builder (on page 1887)
- About Expressions (on page 1890)
- Data Types in Expression Builder (on page 1893)
- Expression Builder Operators (on page 1896)
- Expression Builder Functions (on page 1900)
- Expression Builder Examples (on page 1937)

Using Expression Builder

In Oracle CRM On Demand, you can use Expression Builder wherever you see the *fx* icon beside a text box. Clicking the icon opens Expression Builder in a separate window.

NOTE: For information about field names and the field-name syntax in expressions, see About Expressions (on page 1890).

To build an expression

1. Click the *fx* icon to open Expression Builder.
2. In Expression Builder, select the fields and functions from the lists, or type in the expression editor.

   When you select a field from the list, the language-independent name of the field is pasted in to the expression editor. For example, when you select the Close Date field from the list of Opportunity fields, [{Primary Revenue Close Date}] is pasted into the expression editor.

   NOTE: The field names that are shown in the Fields list in Expression Builder are the display names for the fields. If your administrator changes the display name for a field, then the Fields list shows the new display name for the field. However, when you select the field from the list, the language-independent name of the field is pasted into the expression editor.

   The brackets around the field name indicate that the value of the particular field will be evaluated and returned in its specific data type. See the following table for more information about selecting fields and field values.
3. Edit the expression by adding operators and literals as needed.

   NOTE: If you want your expression to determine whether a picklist field has a certain value, do not type the value in the expression. For example, do not type [{Type}] = "Customer". Instead, select the picklist field from the list, and then click the Show Acceptable Values link in Expression Builder. Select the value that you want to use in the expression from the values shown. The expression looks something like the following:

   [{Type}]=LookupValue("ACCOUNT_TYPE", "Customer")
4. (Optional) Add comments to your expression, as follows:
   - To indicate the start of a comment, type a forward slash (/) followed by an asterisk (*).
   - To indicate the end of a comment, type an asterisk followed by a forward slash.

   For example:

   ```
   /*This is my comment*/
   ```

   You can add comments at the start or end of an expression, or at any location within the expression. You can add multiple comments to a single expression.

   Comments in an expression are ignored when the expression is evaluated. However, it is not possible to include a comment that will be ignored within the subject line or the message in an email on a workflow Send Email action. In these locations, the forward slash and the asterisk are interpreted as plain text and will appear in the subject line or email message, together with any other text that is placed within the asterisks.

   NOTE: You can also use the comment functionality to make an expression inactive. For example, if you want to make a field validation expression inactive, but you do not want to delete it, then enclose the expression within the forward slash and asterisk characters as described here. If you later want to make the expression active again, then delete the forward slash and asterisk characters from the beginning and end of the expression.
5. (Optional) Click Check Syntax, and then make any corrections.
6. Save your expression.

The following table describes Expression Builder.

Interface Element	Description
record type Fields	Provides a context-specific picklist of the fields (from the context record type) that are allowed in an expression. If your company administrator has renamed some fields, the Fields picklist shows the new field names. Note the following points: - If you are creating a workflow rule, or actions related to a workflow rule, the context record type is the record type specified in the definition of the workflow rule. For example, if you are creating the body of an email that is to be sent as an action on a workflow rule for a service request record, the context record type for Expression Builder is Service Request. - In advanced field management, the context record type is the record type that is the parent of the field where the expression is being created. For example, when defining field validation on an opportunity field, the context record type for Expression Builder is Opportunity.
Show Acceptable Values	When you have selected a field from the Fields picklist, click Show Acceptable Values to display the acceptable values for that field. - If the selected field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. You can select only one option at a time. Selecting an option results in the definition of a Lookup function that can be used in an expression. - If the selected field is not a picklist field, Show Acceptable Values displays a window that describes the acceptable values for a variety of data that the field can hold.
Functions	Provides a drop-down list of the special functions that are available to modify, extract, or process data within an expression. For a list of the available functions, see Expression Builder Functions (on page 1900).
Expression	A multiline editable text box that displays the expression. For information about the maximum supported length of an expression, see About Expressions (on page 1890). Fields and functions that you select from the picklists appear in the expression editor. You can also type expressions directly in the expression editor. The expression syntax always displays the language-independent field names. (A language-independent name is a name that does not change when the user language changes.)
Syntax Guide	Displays the Expression Builder topic in Oracle CRM On Demand online help.
Sample Expressions	Displays the following topic, Expression Builder Examples, in Oracle CRM On Demand online help.

Interface Element	Description
Check Syntax	Validates the syntax of the expression that you created.
Save	Saves the expression.
Cancel	Closes the Expression Builder window without saving any changes.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- About Expressions (on page 1890)
- Data Types in Expression Builder (on page 1893)
- Expression Builder Operators (on page 1896)
- Expression Builder Functions (on page 1900)
- Expression Builder Examples (on page 1937)

About Expressions

An expression is a valid combination of one or more operators, functions, fields, and literals that can be evaluated by Oracle CRM On Demand. This topic provides information about the following features of expressions:

- Fields and field-name formats in expressions
- Expression length
- Literal length
- Conditional expressions
- Validation expressions
- Using dependent fields in expressions

Fields and Field-Name Syntax in Expressions

Most of the fields that are available in the field setup page for a record type are also available in the field list for that record type in Expression Builder and can be used in expressions.

NOTE: Custom fields of the Text (Short - Maskable) field type are an exception. You cannot use these fields in an expression in Expression Builder.

When you add a field to an expression by selecting the field name from the field list in Expression Builder, the field is entered in the expression editor with the following syntax:

[{FieldName}]

The field names that appear in the expression editor are language-independent field names that are used to identify the fields internally in Oracle CRM On Demand. Although you can also type field names directly into the expression editor using the [{FieldName}] syntax, it is recommended that you always select the fields from the list of fields, so that the field names in the expression are correct.

About Field Names and Field-Name Syntax in Expressions in Earlier Releases

In releases earlier than Release 29 Service Pack 1 of Oracle CRM On Demand, when you selected a field from the field list in Expression Builder, the field was entered in the expression editor with the following syntax:

[<FieldName>]

In addition, in releases earlier than Release 29 Service Pack 1, Expression Builder used language-independent field names that are different from the language-independent field names used in Expression Builder in Release

29 Service Pack 1 and later releases. However, any expressions that use the [<FieldName>] syntax and the corresponding field names, and that were valid in earlier releases, continue to be valid in Release 29 Service Pack 1 and later releases. You can also continue to type the old language-independent field names with the [<FieldName>] syntax directly in the expression editor, if you wish. However, it is recommended that you always select the fields from the list of fields in Expression Builder, so that the field names and the field syntax are always correct.

An expression can contain a mixture of the new field names and the old field names, provided that the [{FieldName}] syntax is used for the new field names, and the [<FieldName>] syntax is used for the old field names.

About the Examples in Oracle CRM On Demand Online Help

Some of the examples of expressions that appear in the online help use the language-independent field names and the field-name syntax that were used in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields from the field list in Expression Builder when you create or update an expression in Release 29 Service Pack 1 or a later release, then the field names in the expression will be different from the field names shown in the examples in the online help, and the fields will appear in the expression editor with the new field syntax.

Expression Length

For the message body of an email configured through the Send Email action on a workflow rule, the maximum supported length of an expression is 16,350 characters, including spaces. You can insert a line break in the email message by pressing Enter. A line break is counted as two characters in the text box.

In concatenated fields, the maximum supported length for the entire display text, including any expressions, is 500 characters.

In all other cases where Expression Builder is used, the maximum supported length of an expression is 1024 characters, including spaces.

You must also ensure that the total number of characters in the field where you are saving the expression does not exceed the limit for that field. In the following workflow fields, three percent signs (%%%) are placed before and after functions and field names:

- The Subject and Message Body fields in an email configured through the Send Email action
- The Subject and Description fields in a task configured through the Create Task action

The percent signs indicate that the function or field name is to be converted to a text value. Each percent sign is counted as one character in the field where the expression is saved.

If you type a function or field name directly in the field, you must type three percent signs before and after it. If you use Expression Builder to embed a function or field name, the percent signs are automatically added.

For example, if you use Expression Builder to insert the following field name into the message body of an email on a workflow action:

```
[{Name}]
```

Expression Builder inserts the following (a total of 14 characters) into the message body of the email on the workflow action:

```
%%%[{Name}]%%%
```

Literal Length

When you pass a string or numeric literal to a function in Expression Builder, the literal must not contain more than 75 characters, including spaces. If a literal exceeds 75 characters, then Expression Builder considers the literal to be a syntax error. When you pass a string to a function by referencing a field name, the limit of 75 characters does not apply to the length of the value in the field passed to the literal.

When you create an expression to set a default value for a field, the limit of 75 characters applies to any string or numeric literals passed to any function in the expression. In addition, the number of characters in the result of the expression must not exceed the maximum number of characters allowed in the field.

Conditional Expressions

A conditional expression is an expression that, when evaluated by the application, always returns a Boolean value such as True or False.

NOTE: Yes, No, Y, and N are not Boolean values. If you specify True or False as return values for functions such as the IIf (on page 1909) function, then True and False are returned as strings and not as Boolean values. Using incorrect Boolean values in conditional expressions can result in unpredictable behavior.

An expression used in any of the following contexts must be a conditional expression:

- To specify a field validation rule
- To specify a condition in a workflow rule
- As the first parameter in an IIf (on page 1909) function

Validation Expressions

Validation expressions are used to ensure that the data entered in fields is valid. A validation expression must be a conditional expression.

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

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

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

A validation expression is different from other types of expressions in that it can start with a conditional operator. For example, if Account Name is the field being validated by the expression, the expression can start with:

```
= 'Acme Hospital'
```

This expression, though not well formed, will pass a syntax check, because Oracle CRM On Demand inserts the name of the field being validated before the expression if it does not find a field name at the start of the expression. You can also enter the validation expression as follows:

```
[<AccountName>]= 'Acme Hospital'
```

where `[<AccountName>]` is the field being validated.

If the expression requires other fields to be evaluated in addition to the field being validated, it is standard practice for the first comparison in the expression to be performed on the field being validated.

Validation expressions are used only in the Field Validation text box in advanced field management in Oracle CRM On Demand.

Validation Expression Examples

Example 1: A business process requires that the close date of an opportunity must be later than the created date of the opportunity.

To implement this process, create a validation expression for the Close Date field (in the Field Setup page for opportunities) as follows:

```
> [<CreatedDate>]
```

Alternatively, you can use the following example, but note that the field that is being evaluated (Close Date) must be the first field in the expression:

```
[<CloseDate>] > [<CreatedDate>]
```

For information about creating and editing fields, see Creating and Editing Fields (on page 1219).

Example 2: A business process requires that the revenue of an opportunity must be a nonzero value when the probability of the opportunity is 40% or greater.

The business rule indicates that the dependency is on both fields and can be restated as follows:

For an opportunity, revenue cannot be zero when the probability is greater than or equal to 40. Conversely, the probability cannot be greater than or equal to 40 if the revenue is zero.

A validation expression for a field is evaluated when the record is created, and each time the field is updated by a user. Because an update to either the Probability field or the Revenue field can affect both fields, you must have validation rules on both the Probability field and the Revenue field to implement the business rule correctly. (For information about creating and editing fields, see Creating and Editing Fields (on page 1219).)

The steps required to implement this example are as follows:

1. Configure the following validation rule for the Probability field:

   ```
   < 40 OR ([<Probability>]>= 40 AND [<Revenue>]> 0)
   ```

   Note that you do not use the percentage sign (%).
2. Add a validation error message such as the following to the Probability field:

   Revenue must be greater than 0 when the probability is greater than or equal to 40%.
3. Configure the following validation rule for the Revenue field:

   ```
   (> 0 AND [<Probability>]>= 40) OR [<Probability>]< 40
   ```
4. Add a validation error message such as the following to the Revenue field:

   Revenue must be greater than 0 when the probability is greater than or equal to 40%.

Using Dependent Fields in Expressions

A *dependent field* is a joined field whose values depend on a foreign key. A *joined field* is a field on a record type that uses a foreign key to reference a field on another record type. An example of a dependent field is the AccountName field on the Opportunity record type. The AccountName field on the Opportunity record type is a joined field whose values depend on the AccountId foreign key field, which references the Account record type.

If your expression has to determine the value of a dependent field, then it is recommended that you use the JoinFieldValue function and get the most recent value of the field by referring to the ID field; that is, the foreign key field. Otherwise, the results of your expression might be incorrect, and the outcome of the expression value might be invalid. For more information about joined fields and the JoinFieldValue function, see JoinFieldValue (on page 1912).

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Data Types in Expression Builder

This topic describes the data types in Oracle CRM On Demand, and how they are used in Expression Builder.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

Data Types in Oracle CRM On Demand

The following table shows the data type returned when an Oracle CRM On Demand field is used in an expression. To get the value of a field, use the [{FieldName}] syntax or the [<FieldName>] syntax.

Oracle CRM On Demand Field Type	Return Type in Expressions
Integer	Integer
Picklist	String
Currency	Currency
ID	String
Text	String
Check box	Boolean. For example, you can use [<Active>] directly in places where conditions are expected. You can also use FieldValue('<Active>') = 'Y'.
Date	Date
Date Time	Date Time
Number	Number

Data Type Arithmetic

When a statement references more than one field value, and the fields have different data types, the order of the data types can affect the calculation. When an operator (other than the exponent operator) is applied to two operands of two different data types, the operand on the right side of the operator is converted to the data type of the operand on the left side before the operation is evaluated. For example, if CloseDate is 02/09/2007, the following expression:

```
PRE('<CloseDate>') + 30
```

evaluates to 02/09/200730. Therefore, the following condition:

```
[<CloseDate>] > PRE('<CloseDate>') + 30
```

is syntactically valid, but its meaning is invalid. The condition is correctly written as follows:

```
[<CloseDate>] - 30 > PRE('<CloseDate>').
```

NOTE: When the exponent operator is used, the operand on the right side of the operator is not converted to the data type of the operand on the left side.

The following tables show the possible results of the various arithmetic operations, using the example values.

Field	Data Type	Example Value
Quantity	Integer	5
Item Price	Currency	2.25

Calculation	Result	
	Value	Data Type
[<Item Price>] + [<Quantity>]	7.25	Currency
[<Quantity>] + [<Item Price>]	7	Integer
[<Item Price>] - [<Quantity>]	(2.75) **NOTE:** For currency fields, parentheses indicate that the value is negative.	Currency
[<Quantity>] - [<Item Price>]	3	Integer
[<Item Price>] * [<Quantity>]	11.25	Currency
[<Quantity>] * [<Item Price>]	10	Integer
[<Item Price>] / [<Quantity>]	0.45	Currency
[<Quantity>] / [<Item Price>]	2.50	Currency

When the exponent operator is used, the operand on the right side of the operator is not converted to the data type of the operand on the left side.

In this example (where Quantity is an integer field, value 5, and Item Price is a currency field, value 2.25), if the operand on the right side of the operator was converted to the data type of the operand on the left side, the expected value of Quantity ^ Item Price would be 25, and the expected data type would be integer. However, the results are shown in the following table.

Calculation	Result	
	Value	Data Type
[<Item Price>] ^ [<Quantity>]	57.67	Currency
[<Quantity>] ^ [<Item Price>]	37.38	Currency

The negation operator (minus sign [-]) is also supported in Expression Builder. For example:

Calculation	Result	
	Value	Data Type
-1 * [<ItemPrice>]	(2.25)	Currency

If you convert a number to a string, the calculation does not work correctly. For example:

Calculation	Result		Description
	Value	Data Type	
1234 + abcd	1234	Number	The string "abcd" evaluates to the number 0 and is then added to 1234.
abcd + 1234	abcd1234	String	The number 1234 evaluates to the string "1234" and is appended to the string "abcd".

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Expression Builder Operators

This topic describes the operators that you can use in Expression Builder, and the order in which they are evaluated.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

Arithmetic Operators

The following table describes the purpose of each arithmetic operator and gives an example of how it is used.

Operator	Purpose	Example
+	Add	[<Record Number>] + 1
-	Subtract	[<Record Number>] - 1
-	Negate	[<Revenue>] < -100
*	Multiply	[<Subtotal>] * 0.0625

Operator	Purpose	Example
/	Divide	[<Total Items>] / [<Total Orders>]
^	Exponent	[<Grid Height>] ^ 2

Logical Operators

The following truth table shows the possible results from the logical operators in Expression Builder.

Logical Operator	First Operand	Second Operand	Result
NOT	TRUE		FALSE
	FALSE		TRUE
	NULL		NULL
AND	TRUE	TRUE	TRUE
	FALSE	FALSE	FALSE
	TRUE	FALSE	FALSE
	FALSE	TRUE	FALSE
	TRUE	NULL	NULL
	FALSE	NULL	FALSE
	NULL	TRUE	NULL
	NULL	FALSE	FALSE
	NULL	NULL	NULL
OR	TRUE	TRUE	TRUE
	FALSE	FALSE	FALSE
	TRUE	FALSE	TRUE
	FALSE	TRUE	TRUE
	TRUE	NULL	TRUE
	FALSE	NULL	NULL

Logical Operator	First Operand	Second Operand	Result
	NULL	TRUE	TRUE
	NULL	FALSE	NULL
	NULL	NULL	NULL

Comparison Operators

The following table describes the purpose of each comparison operator and gives an example of how it is used.

Operator	Purpose	Example
=	Tests that the first operand is equal to the second operand.	[<Last Name>] = "Smith"
< >	Tests that the first operand is not equal to the second operand.	[<Role>] <> "End-User"
>	Tests that the first operand is greater than the second operand.	[<Revenue>] > 5000
<	Tests that the first operand is less than the second operand.	[<Probability>] < .7
> =	Tests that first operand is greater than or equal to the second operand.	[<Revenue>] >= 5000
< =	Tests that the first operand is less than or equal to the second operand.	[<Probability>] <= .7
LIKE	Tests that the value of the first operand matches the specified string.	[<Last Name>] LIKE "Smith" **TIP:** You can use the asterisk (*) and question mark (?) pattern matching special characters with the LIKE operator.
NOT LIKE	Tests that the value of the first operand does not match the specified string.	[<Last Name>] NOT LIKE "Smith" or NOT ([<Last Name>] LIKE "Smith")

Operator	Purpose	Example
		NOTE: The parentheses are required in the second example. **TIP:** You can use the asterisk (*) and question mark (?) pattern matching special characters with the NOT LIKE operator.
IS NULL	Tests that the operand is null.	[<Last Name>] IS NULL
IS NOT NULL	Tests that the operand is not null.	[<Last Name>] IS NOT NULL

Pattern Matching Special Characters

The following table describes the pattern matching special characters. These special characters can be used with the LIKE and NOT LIKE comparison operators.

Character	Purpose	Example
*	Zero or more characters	[<Last Name>] LIKE "Sm*" returns all records where the [<Last Name>] value starts with the characters *Sm*, as in *Smith*, *Smythe*, *Smart,* and so on. [<Last Name>] LIKE "*om*" returns all records where the [<Last Name>] field contains the characters *om*, as in *Thomas*, *Thompson*, *Tomlin*, and so on.
?	One character	[<First Name>] NOT LIKE "Da?" returns all records where the [<First Name>] value is three characters long and does not start with the letters *Da*. Records with *Ted*, *Tom*, and *Sam* are returned, but *Dax* and *Dan* are not. NOT ([<First Name>] LIKE "?o?") returns all records where the [<First Name>] value is three characters long and does not have as its middle character *o*. Records with *Ted* and *Sam* are returned, but *Tom* and *Bob* are not.

Concatenation Operator

The + (plus) operator is used in emails to concatenate field values and text.

Precedence of Operators

Precedence is the order in which Oracle CRM On Demand evaluates the various operators within a single expression. The following rules apply:

- Operators with higher precedence are evaluated before operators with lower precedence.
- Operators with equal precedence are evaluated from left to right.
- Lower-level numbers indicate higher precedence.
- The use of parentheses affects the order of precedence within an expression. The expression within parentheses is evaluated before the expression outside the parentheses.

The levels of precedence are listed in the following table.

Level	Operator
1	( )
2	- (negation)
3	^ (exponentiation)
4	* (multiplication), / (division)
5	+ (addition), - (subtraction), NOT logical operator
6	AND logical operator
7	OR logical operator
8	=, <>, >, <, >=, <= comparison operators

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Expression Builder Functions

The following table lists the functions that you can use in Expression Builder. Click the name of a function to see more information about the function.

Boolean Functions	Date and Time Functions	String Functions	User Functions	Data Functions	Math Functions
IfNull (on page 1909)	Duration (on page 1902)	FieldValue (on page 1906)	Locale (on page 1919)	ExcludeChannel (on page 1904)	LN (on page 1919)
IIf (on page 1909)	JulianDay (on page 1914)	FindNoneOf (on page 1907)	LocaleListSeparator (on page 1920)	GetGroupId (on page 1908)	
IsValidRowId (on page 1911)	JulianMonth (on page 1915)	FindOneOf (on page 1907)	OrganizationName (on page 1924)	JoinFieldValue (on page 1912)	
	JulianQtr (on page 1915)	HostName (on page 1908)	UserValue (on page 1932)	LookupName (on page 1920)	

Boolean Functions	Date and Time Functions	String Functions	User Functions	Data Functions	Math Functions
	JulianWeek (on page 1916)	InStr (on page 1910)		LookupValue (on page 1921)	
	JulianYear (on page 1917)	Left (on page 1917)		PRE (on page 1924)	
	Timestamp (on page 1928)	Len (on page 1918)		RowIdToRowNum (on page 1926)	
	Today (on page 1931)	Lower (on page 1922)		RowNum (on page 1927)	
	UtcConvert (on page 1936)	Mid (on page 1923)			
		Right (on page 1926)			
		ToChar (on page 1928)			
		Upper (on page 1931)			

Note the following information regarding other functions:

- Some of the functions listed in the drop-down list on the Functions field in Expression Builder are for internal use only. Do not use the following functions in your expressions:
  - GetParentId
  - IsManagerPosition
  - Lookup
  - LookupMessage
  - LOVLanguage
  - PositionId
  - PositionName
- It is recommended that you use the UserValue (on page 1932) function instead of the functions listed in the following table. These functions will become obsolete.

Function	Recommended Alternative
Alias	UserValue('<Alias>')
Currency	UserValue('<CurrencyCode>')

Function	Recommended Alternative
DivisionName	UserValue('<Division>')
FirstName	UserValue('<FirstName>')
JobTitle	UserValue('<JobTitle>')
Language	UserValue('<LanguageCode>')
LanguageName	UserValue('<Language>')
LastName	UserValue('<LastName>')
LocalCurrency	UserValue('<CurrencyCode>')
LocaleName	UserValue('<Locale>')
LoginId	UserValue('<UserId>')
LoginName	UserValue('<UserSignInId>')

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)

Duration

The Duration function in Expression Builder returns a number that indicates a period in days or fractions of days as indicated by the period argument.

Syntax

Duration(period)

Result Type

Number

Arguments

The following table describes the arguments for the function.

Argument	Description
period	Specifies the period that is to be returned. The value can be a string literal in the format P*n*Y*n*M*n*DT*n*H*n*M, or an expression that evaluates to a string in the format P*n*Y*n*M*n*DT*n*H*n*M. In the P*n*Y*n*M*n*DT*n*H*n*M string: - P is the period indicator

Argument	Description
	- *n*Y specifies the number of years - *n*M specifies the number of months - *n*D specifies the number of days - T separates the date and time specifications - *n*H specifies the number of hours - *n*M specifies the number of minutes For example, assume that you want to specify a period of 50 months. You can specify the period as a string literal, for example, as P4Y2M, or as P50M. Alternatively, if you want to specify a period that varies depending on a value in a field, then you can use that field in an expression in the argument. In the following example, Deferral Period is a custom field that is set up to store a value for a period in months. The value in the Deferral Period field is used to calculate the period: `Duration('P'+ FieldValue([{nDeferral_Period}]) +'M')` So, if the value in the Deferral Period field is 12, then the expression evaluates to P12M, which is a valid string for the argument. If the value in the Deferral Period field is 50, then the expression evaluates to P50M, which is also a valid string. You can specify any number of years, months, days, hours, or minutes in the string literal. Similarly, if the argument contains an expression, there is no limit on the number that can be returned by the expression.

The following considerations apply to the period argument:

- Do not specify a plus sign (+) for positive values.
- You can specify a negative duration as -Duration(period) or Duration(-period).
- Specifying seconds is not supported.
- If the number of years, months, days, hours, or minutes is zero, you can omit the number and its corresponding designator.
- If none of the time components are present in the period, the T designator must not be included in the period.
- The designator *P* must always be present in the period.

Examples

The following are valid examples of the Duration function:

```
Duration('P0Y1M1DT2H5M')

Duration('P0Y0DT1H')

Duration('P1D')

Duration('P0Y0M0DT0H0M')

Duration('P0DT1M')

Duration('P24M')

Duration('P500D')
```

```
Duration('P'+ FieldValue([{nDeferral_Period}])+'M')
Duration('PT1000H3M')
Duration('-P1Y200M')
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

ExcludeChannel

The ExcludeChannel function in Expression Builder returns FALSE if the specified channel name is the channel that the request came from.

Syntax

ExcludeChannel(channel name)

Result Type

Boolean

Arguments

The following table describes the arguments for the function.

Argument	Description
channel name	The name of the channel to be excluded.

The following table describes the valid strings for use in the channel name argument. The strings are case-sensitive.

Channel Name String	Description
Import	This channel string excludes updates performed through the import functionality and through Oracle Data Loader On Demand.
Online	This channel string excludes updates performed by: - User interactions in browser windows, including updates from the Mass Update functionality and record merges - REST API calls **NOTE:** The Online channel string does not exclude updates performed through the import functionality.

Channel Name String	Description
Mass Update	This channel string excludes updates performed through the Mass Update functionality only. **NOTE:** Updates performed through the Mass Update functionality are also excluded by the Online channel string.
Record Merge	This channel string excludes updates performed by record merges only. **NOTE:** Updates from record merges are also excluded by the Online channel string.
Web Services	This channel string excludes updates from Web services.
Office	This channel string excludes updates from Oracle CRM On Demand Integration for Office.
OEI	This channel string excludes updates from Oracle Outlook Email Integration On Demand and Oracle Notes Email Integration On Demand.
Desktop	This channel string excludes updates from Oracle CRM On Demand Desktop.
Rest	This channel string excludes updates from REST API calls only. **NOTE:** Updates from REST API calls are also excluded by the Online channel string.
Mobile	This channel string excludes updates from Oracle CRM On Demand Connected Mobile Sales.

Examples

The following example stops a process from being triggered by a Web service request:

```
ExcludeChannel("Web Services")
```

The following example stops a process from being triggered by an import operation or Oracle Data Loader On Demand:

```
ExcludeChannel("Import")
```

Example of Allowing Specified Online Updates

When the Online channel string is specified with the ExcludeChannel function, updates from the following channels are prevented:

- All user interactions in browser windows, including updates performed through the Mass Update functionality and record merges
- REST API calls

If you want to allow updates from REST API calls, or the Mass Update functionality, or record merges, but you want to prevent updates from other user interactions in browser windows, then use the IIF function with the ExcludeChannel function to specify the online channels that you want to allow. For example, to allow updates to account records by REST API calls and prevent updates to account records from user interactions in browser windows, including the Mass Update functionality and record merges, you can create a workflow rule with the following configuration:

- The record type is Account.
- The trigger event is Before Modified Record Saved.
- The Cancel Save check box is selected.
- The condition is as follows:

```
IIf(ExcludeChannel("Online"),1,IIf(ExcludeChannel("Rest"),0,1))
```

This workflow rule allows updates from all channels that are not prevented by the Online channel string, such as Web services and the import functionality, as well as updates from REST API calls.

NOTE: When combining the ExcludeChannel function with another function as shown in this example, remember that the ExcludeChannel function returns a FALSE value if the specified channel name is the channel that the request came from.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

FieldValue

The FieldValue function in Expression Builder returns the value of a field as a string.

Syntax

FieldValue('<field_name>')

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
field_name	The valid XML name or customized integration tag corresponding to the chosen field. Integration tags are displayed in the Integration Tag Web Services v2.0 column in the *record type* Fields page.

Examples

The following example:

```
FieldValue('<CreatedDate>')
```

returns the value of the Created Date field as a string.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

FindNoneOf

The FindNoneOf function in Expression Builder returns the position of the first instance in the first argument (string1) that does not match any character in the second argument (string2).

Syntax

FindNoneOf(string1, string2)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string1	A string, text field, or string expression to search.
string2	A string, text field, or string expression to match.

Examples

The following example returns the value 4:

```
FindNoneOf ("abcdef", "abc")
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

FindOneOf

The FindOneOf function in Expression Builder returns the position of the first instance in the first argument (string1) of a character in the second argument (string2).

Syntax

FindOneOf(string1, string2)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string1	A string, text field, or string expression to search.
string2	A string, text field, or string expression to match.

Examples

The following example returns the value 3:

```
FindOneOf ("abcdef", "xyzc")
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

GetGroupId

The GetGroupId function in Expression Builder returns the Oracle CRM On Demand calendar-sharing group.

Syntax

GetGroupId()

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

HostName

The HostName function in Expression Builder returns the host name of the server where Oracle CRM On Demand is running.

Syntax

HostName

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

IfNull

The IfNull function in Expression Builder returns the value from the first argument that is passed to the function. If the first argument returns NULL, the value from the second argument is returned.

Syntax

IfNull(expr1, expr2)

Result Type

The result type of the IfNull function is the type of its first argument, even if the first argument is NULL. The second argument is converted to the type of the first argument before its value is returned.

Arguments

The following table describes the arguments for the function.

Argument	Description
expr1	A field name or expression.
expr2	The field name or expression that is returned if expr1 is NULL.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

IIf

The IIf function in Expression Builder returns one of two parameters based on the evaluation of a conditional expression. IIf is an abbreviation for Immediate If.

Syntax

IIf(expr, result_if_true, result_if_false)

Alternate Syntax

IIf(expr, expr_if_true, expr_if_false)

Mixed Syntax

IIf(expr, result_if_true, expr_if_false)

IIf(expr, expr_if_true, result_if_false)

Result Type

The result type of the IIf() function is always the type of its first argument. If the expression evaluates to FALSE, the second argument is converted to the type of the first argument before its value is returned.

Arguments

The following table describes the arguments for the function.

Argument	Description
expr	The conditional expression that is to be evaluated.
result_if_true	The return value if the conditional expression evaluates to true.
result_if_false	The return value if the conditional expression evaluates to false.
expr_if_true	An expression to be evaluated if the conditional expression evaluates to true.
expr_if_false	An expression to be evaluated if the conditional expression evaluates to false.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

Examples

The following is an example of mixed syntax in the IIf function:

A business process requires that the Region field on an account detail page is to be updated when the Billing State field is changed as follows:

If the Billing State field is changed to OK or TX, the region field is to be updated to Central. If the Billing State field is changed to CA, the Region field is to be updated to West. For all other states, the Region field is to be updated to East.

```
IIf([<PrimaryBillToState>]='OK' OR [<PrimaryBillToState>]='TX', 'Central',
IIf([<PrimaryBillToState>]='CA', 'West', 'East'))
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

InStr

The InStr function in Expression Builder returns the position of the first occurrence of one string within another.

Syntax

Instr(string1, string2, start, end)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string1	Specifies the string that is to be searched. The value can be a string literal, or a field name, or an expression that returns a string.
string2	Specifies the string that is to be searched for. The value can be a string literal, or a field name, or an expression that returns a string. **NOTE:** The search for a string is case-sensitive.
start	(Optional) An integer that specifies the start point in string1.
end	(Optional) An integer that specifies the end point in string1.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

Examples

The following example returns the value 9:

```
InStr('john.doe@company.com','@')
```

The following example shows how the InStr function can be used in a workflow rule condition. In the workflow rule condition, the InStr function is used to determine if a specified string appears in a field on the record. If the string is found in the field, then the actions specified on the workflow rule are performed. In this example, the InStr function determines if the Subject field in a record contains the word *REVIEW*. The action on the workflow rule is performed only if the Subject field contains the word *REVIEW* in uppercase letters.

```
InStr([<Subject>], 'REVIEW') > 0
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

IsValidRowId

The IsValidRowId function in Expression Builder queries records of a specified record type to determine if a certain row ID exists, and returns a Boolean value (TRUE or FALSE). If the row ID exists but the record is marked for deletion, then the IsValidRowId function returns FALSE.

Syntax

IsValidRowId(record_type, 'row_id')

Result Type

Boolean (TRUE or FALSE).

Arguments

The following table describes the arguments for the function.

Argument	Description
record_type	The language-independent name of the record type. (A *language-independent name* is a name that does not change when the user language changes.) The argument must be enclosed in field string identifiers. For example: `'<Contact>'`
row_id	The string literal, field name, or expression that returns an alphanumeric row ID.

Examples

The following example determines if the value in the Row Id field on a contact record is a valid row ID for a contact record:

```
IsValidRowId('<Contact>', [{Id}])
```

The following example determines if the value 12-Y09KG is a valid row ID for an account record:

```
IsValidRowId('<Account>', '12-Y09KG')
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

JoinFieldValue

A record type can be referenced by another record type through a foreign key. A *joined field* is a field on a record type that uses a foreign key to reference a field on another record type. For example, on most record types, the OwnerId field is a foreign key that references the User record type. The Owner field on many records is a joined field that uses the OwnerId foreign key to reference the Alias field on the User record type.

The JoinFieldValue function in Expression Builder returns the value of a joined field when the referenced record type and the related foreign key fields are specified in the function. The JoinFieldValue function can also retrieve other fields on the referenced record type that are not directly joined to the referencing object, which allows you to look up fields across record types from related record types.

If the ID field of a referenced record type is present as a foreign key on the record type on which you configure a workflow rule, then you can use the JoinFieldValue function to retrieve field values from the referenced record type.

Also, you can use the following foreign key fields, which are available on all record types, to retrieve field values from the User record type:

- CreatedById
- ModifiedById

NOTE: The JoinFieldValue function cannot return the values of the following fields in the Activity record type: Disbursement Transaction Count, Product Detailed Count, Promotional Items Dropped Count, and Samples Dropped Count. This limitation is due to the way that Oracle CRM On Demand calculates the values of these fields.

Syntax

JoinFieldValue (ref_record_type, foreign_key, field_name)

Result Type

String.

If an error occurs or the requested field value is empty, a zero-length string is returned.

Arguments

The following table describes the arguments for the function.

Argument	Description
ref_record_type	The language-independent name of the referenced record type. (A *language-independent name* is a name that does not change when the user language changes.) The argument must be enclosed in field string identifiers. For example: `'<Account>'`
foreign_key	A literal or expression that returns a valid row ID in the referenced record type (specified in the ref_record_type argument). If the row ID is invalid, the function returns a zero-length string. Direct field references must be enclosed in field identifiers. For example: `[<AccountId>]`
field_name	The language-independent name of a field in the referenced record type (specified by the ref_record_type argument). If the field does not exist in the referenced record type, an error is returned. The field name must be enclosed in field string identifiers. For example: `'<Type>'`

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

Examples

Example 1: A business process requires a workflow rule to look up the name of the new owner when the owner of a record is changed. When the owner of a record is changed, only the OwnerId foreign key field on the record is updated. As a result, the following condition on a workflow rule does not look up the new owner of the record:

```
PRE('<Owner>') <> [<Owner>]
```

Instead, you can use the following condition in the workflow to look up the new owner of the record:

```
PRE('<Owner>') <> JoinFieldValue('<User>',[<OwnerId>],'<Alias>')
```

Example 2: To get the email address of the previous owner of a record, use the following expression:

```
JoinFieldValue('<User>',PRE('<OwnerId>'),'<EMailAddr>')
```

Example 3: To get the email address of the current owner of a record, use the following expression:

```
JoinFieldValue('<User>',[<OwnerId>],'<EMailAddr>')
```

Example 4: A business process requires that a service request email is sent to a contact. Before the email is sent, the workflow rule checks that the contact has agreed to receive emails. The workflow rule (based on the service request record type) has the following condition:

```
JoinFieldValue('<Contact>',[<ContactId>],'<NeverEmail>')<> 'Y'
```

Example 5: To get the territory of the primary account for a service request, use the following expression:

```
JoinFieldValue('<Territory>', JoinFieldValue('<Account>', [<AccountId>],
'<TerritoryId>'),'<TerritoryName>')
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

JulianDay

The JulianDay function in Expression Builder returns the number of days that have elapsed since noon Universal Time, January 1, 4713 BC.

Syntax

JulianDay(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type. To return the value for today's date, use the following syntax:

Argument	Description
	JulianDay(Today())

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

JulianMonth

The JulianMonth function in Expression Builder returns an integer that is equal to:

JulianYear * 12 + *current_month*

where *JulianYear* is the year that is returned by the JulianYear (on page 1917) function, *current_month* is an integer from 1-12, and January is 1.

Syntax

JulianMonth(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type. To return the value for today's date, use the following syntax: JulianMonth(Today())

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

JulianQtr

The JulianQtr function in Expression Builder returns an integer that is equal to:

JulianYear * 4 + *current_quarter*

where *JulianYear* is the year returned by the JulianYear (on page 1917) function, and *current_quarter* is:

(*current_month* - 1) / 3 + 1

rounded down to the next integer.

Syntax

JulianQtr(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type. To return the value for today's date, use the following syntax: JulianQtr(Today())

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

JulianWeek

The JulianWeek function in Expression Builder returns an integer that is equal to:

`JulianDay / 7`

rounded down to the next integer, where *JulianDay* is the day that is returned by the JulianDay (on page 1914) function.

Syntax

JulianWeek(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type. To return the value for today's date, use the following syntax: JulianWeek(Today())

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)

- Expression Builder Functions (on page 1900)

JulianYear

The JulianYear function in Expression Builder returns an integer that is equal to:

current_year + 4713

Syntax

JulianYear(date)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
date	A field name that returns a date data type. To return the value for today's date, use the following syntax: JulianYear(Today())

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Left

The Left function in Expression Builder returns a specified number of characters from the left side of a string.

Syntax

Left(string, length)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	The string from which the leftmost characters are returned. If the string contains Null, Null is returned.
length	An integer indicating the number of characters to return. If this argument is 0 (zero), a blank string is returned. If this

Argument	Description
	argument is greater than or equal to the number of characters in the string, the entire string is returned.

Examples

If the current user's email address is john.doe@oracle.com, the following example returns the value john:

```
Left(UserValue('<EMailAddr>'), 4)
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Len

The Len function in Expression Builder returns the number of characters in a specified string.

Syntax

Len(string)

Result Type

Integer

Arguments

The following table describes the arguments for the function.

Argument	Description
string	The field name or string expression from which the characters are counted. If the string is blank, 0 (zero) is returned. If the string contains Null, Null is returned.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

Examples

The following example returns the value 18:

```
Len("Oracle Corporation")
```

The following example returns the value 19 if the field contains a valid timestamp:

```
Len([<CreatedDate>])
```

The following example returns the value 19:

```
Len(Timestamp()) returns 19
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

LN

The LN function in Expression Builder returns the natural log of the number passed in the argument.

Syntax

LN(number)

Result Type

Number

Arguments

The following table describes the arguments for the function.

Argument	Description
number	The number for which the natural log is to be returned.

Examples

The following example:

```
LN(10)
```

returns the value 2.30.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Locale

The Locale function in Expression Builder returns the locale code for the signed-in user, for example, ENU.

Syntax

Locale()

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

LocaleListSeparator

The LocaleListSeparator function in Expression Builder returns the list separator character for the current locale, for example, a comma (,).

Syntax

LocaleListSeparator()

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

LookupName

The LookupName function in Expression Builder finds a row in the List of Values table where all of the following are true:

- The TYPE field matches the type argument.
- The CODE field matches the lang_ind_code argument.
- The LANG_ID field matches the language code of the currently active language.

This function returns the untranslated value (the language independent code) of the display value in the specified List of Values.

TIP: When specifying the parameters for the LookupName function, click Show Acceptable Values to display the acceptable values for the field that you selected in the Fields list. (If a field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. If a field is not a picklist field, Show Acceptable Values opens a window that describes the acceptable values for a variety of data that the field can hold.)

Syntax

LookupName(type, lang_ind_code)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
type	The type of the row to be searched for.

Argument	Description
lang_ind_code	The display value.

Example

If CALIFORNIA is the display value and CALIF is the language independent code, both of the following examples return the value CALIF:

```
LookupName('STATE_ABBREV', 'CALIFORNIA')
```

```
LookupName('STATE_ABBREV', 'CALIF')
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

LookupValue

The LookupValue function in Expression Builder returns a specified picklist value that is translated into the currently active language.

Picklist values are stored in the List of Values table. The LookupValue function returns the value in the VAL column of a row where all of the following are true:

- The TYPE column matches the type argument.
- The CODE column matches the lang_ind_code argument.
- The LANG_ID column matches the language code of the currently active language.

The LookupValue function allows Oracle CRM On Demand to evaluate expressions involving picklist values uniformly across locales. For example, the value *White* in English is evaluated in the same way as the value *Blanc* in French.

TIP: When specifying the parameters for the LookupValue function, click Show Acceptable Values to display the acceptable values for the field that you selected in the Fields list. (If a field is a picklist field, Show Acceptable Values displays all the options configured for that picklist. If a field is not a picklist field, Show Acceptable Values opens a window that describes the acceptable values for different data that the field can hold.)

NOTE: The Sales Stage field in opportunity records is not a true picklist field. The LookupValue function does not work on this field.

Syntax

LookupValue (type, lang_ind_code)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
type	The type of the row to be searched for.
lang_ind_code	The untranslated value in the list of values.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Lower

The Lower function in Expression Builder converts all letters in the specified string to lowercase. If there are characters in the string that are not letters, they are unaffected by this function.

Syntax

Lower(string)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	Specifies the string that is to be converted. The value can be a string literal, or a field name, or an expression that returns a string. If the value is a string literal, then it must be enclosed in single or double quotation marks.

Examples

If the First Name field on a contact record contains the value Amanda, then the following example returns the value amanda:

```
Lower([{First Name}])
```

The following examples both return the value account123:

```
Lower('Account123')
```

```
Lower("Account123")
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Mid

The Mid function in Expression Builder returns a specified number of characters from a string.

TIP: To determine the number of characters in a string, use the Len (on page 1918) function.

Syntax

Mid(string, start, length)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	The field name or string expression from which the characters are returned. If the string contains Null, a blank string is returned.
start	The field name or expression that specifies the character position in the string at which the length count begins. If the value of the start argument is greater than the number of characters in the string, the Mid function returns a blank string.
length	Optional. The field name or expression that specifies the number of characters to return. If this argument is not used, or the length specified is greater than the number of characters that can be returned, all characters from the start position to the end of the string are returned.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

Examples

The following example returns seven characters (Builder), beginning with the twelfth character in a string:

```
Mid("Expression Builder is easy!!", 12, 7)
```

The following examples return seven characters, beginning with the twelfth character from a text field that contains the text: *Expression Builder is easy!!*

```
Mid('<TextFieldName>',12, 7)
```

or

```
Mid([<TextFieldName>],12, 7)
```

The following example extracts the domain name from an email address:

Mid([<CreatedbyEmailAddress>],FindOneOf([<CreatedbyEmailAddress>], "@") + 1, Len([<CreatedbyEmailAddress>]))

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

OrganizationName

The OrganizationName function in Expression Builder returns the organization name of the signed-in user.

Syntax

OrganizationName()

Result Type

String

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

PRE

The PRE function in Expression Builder returns the previous value of the specified field when the field value is modified but before the value is updated in the database.

CAUTION: It is strongly recommended that you do not use the PRE function with workflow rules containing a Wait action, because the Wait action affects the PRE function. Any actions following the Wait action are not performed until the specified wait period has expired. The remaining actions are performed in a different batch operation than the operation where the rule was originally triggered, and the values of the fields on the record prior to the action that triggered the workflow rule are not preserved. Therefore, the previous value and the current value of the field are always considered to be the same.

Syntax

PRE('<fieldname>')

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
fieldname	The name of the field that was modified.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

The following considerations apply when using the PRE function:

- In conditional expressions, such as workflow conditions and validation statements, when you use the PRE function to retrieve the previous value of a field, remember that the initial value of the field can be blank (that is, a null value). If the initial value is null, any comparison with a non-null value results in unpredictable behavior. To ensure that conditional expressions are evaluated correctly in such cases, use the PRE function with the IfNull function as shown in this example:

  IfNull([<FieldName>], "Invalid") <> IfNull(PRE('<FieldName>'), "Invalid")

  In this example, the text string *Invalid* is used to replace the null value, but you can use any string that you want, provided that the string does not exist as a value in the field that is being examined.
- If the PRE function is used in a workflow rule or action that is invoked after a Wait action, the function does not return the previous value of a field. However, you might have a business process that requires such comparisons. In such cases, you can use a workflow rule with the Before Modified Record Saved trigger event to store the previous value of a field in any unused field on the record type. You can then use the stored field value for any comparisons you require in workflow rules that have the Wait action.

  When you create the workflow rule to store the previous value of a field in an unused field on the record type, remember that the previous value of the original field might be blank (that is, a null value). Therefore, you must use an expression such as the following to store a default value if a null value is encountered:

  IfNull([<FieldName>], "Invalid")

  In this example, the text string *Invalid* is the default value that is used to replace a null value, but you can use any string you want, provided that the string does not exist as a value in the original field.

Example of Creating a Workflow Rule That Sends an Email to the Previous Owner of an Account Record

The following is an example of how to create a workflow rule that sends an email to the previous owner of an account record when the owner of the record is changed.

To create a workflow rule that sends an email to the previous owner of an account record

1. Create a workflow rule for the Account record type with the When Modified Record Saved trigger event.
2. Save the workflow rule.
3. Create an Add an Email action on the workflow rule.
4. On the workflow action, do the following:
   a. In the To field, select Specific Email Address.
   b. In the To field expression text box, add the following expression:

      JoinFieldValue('<User>', IfNull(PRE('<OwnerId>'), "admin@mycompany.com"),'<EMailAddr>')
   c. Add the necessary text in the subject and body of the email.
   d. Save the workflow action.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)

- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Right

The Right function in Expression Builder returns a specified number of characters from the right side of a string.

Syntax

Right(string, length)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	The string from which the rightmost characters are returned. If the string contains Null, Null is returned.
length	An integer indicating the number of characters to return. If this argument is 0 (zero), a blank string is returned. If this argument is greater than or equal to the number of characters in the string, the entire string is returned.

Examples

If the current user's email address is john.doe@oracle.com, the following example returns the value oracle.com:

```
Right(UserValue('<EMailAddr>'), Len(UserValue('<EMailAddr>'))-
InStr(UserValue('<EMailAddr>'),'@'))
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

RowIdToRowNum

The RowIdToRowNum function in Expression Builder converts an alphanumeric Row ID to a numeric format.

NOTE: Row IDs are generated by Oracle CRM On Demand using a proprietary algorithm, and have full referential integrity across the Oracle CRM On Demand database. The algorithm uses Base-36 encoding, a positional numeral system where the radix is 36. Using 36 as the radix allows the digits to be represented by the numbers 0-9 and the letters A-Z, which is an optimized, case-insensitive alphanumeric numeral system, based on ASCII characters.

Syntax

RowIdToRowNum('row_id')

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
row_id	The string literal, field name, or expression that returns an alphanumeric row ID.

NOTE: The language-independent field names and the field-name syntax used in any example expressions in this topic are the field names and the field-name syntax that were used in Expression Builder in releases earlier than Release 29 Service Pack 1. These examples are still valid. However, if you select the corresponding fields for an expression from the Fields list in Expression Builder in Release 29 Service Pack 1 or later, then the field names and the field-name syntax will be different from those shown in the examples. It is recommended that you always select the fields for your expressions from the Fields list in Expression Builder, so that the field names and the field-name syntax are always correct. For more information about the field names and the field-name syntax in expressions, see About Expressions (on page 1890).

Examples

The following example:

RowIdToRowNum('12-6RX8L').

returns the value 38-8021253.

The following example:

RowIdToRowNum('12-Y09KG')

returns the value 38-57119344.

If the <AccountID> field contains '12-Y09KG', the following example:

RowIdToRowNum('<AccountID>')

returns the value 38-57119344.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

RowNum

The RowNum function in Expression Builder returns the position of the record within the active set of records.

Syntax

RowNum()

Result Type

Integer

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Timestamp

The Timestamp function in Expression Builder returns the server date and time converted to the current user's time zone setting. For example, if the current user's time zone setting is set to Eastern Daylight Time (EDT) -0400 UTC, the Timestamp function converts the server time to EDT. The TimeStamp function performs UTC (universal time code) conversion.

NOTE: Arithmetic operations (for example, add or subtract) are not supported with the Timestamp() function.

Syntax

Timestamp()

Result Type

Date Time

Examples

The following example returns the current date and time, in the format month/day/year hours24:minutes:seconds:

```
Timestamp()
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

ToChar

The ToChar function in Expression Builder converts a specified date or numeric expression to a formatted string.

Syntax

ToChar(expression, format)

CAUTION: Do not use both date formats and number formats in an instance of the ToChar function. Doing so can lead to invalid results.

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
expression	An expression or field that returns a date, date and time, or a numeric value.
format	A string that represents the date or number format.

The following table describes the date formats for the function.

Format Code	Description
DD	A two-digit day of month (01-31).
DDDD dddd	The name of the day.
MM	A two-digit month number (01-12 where 01 is JAN). You must use *MM* in uppercase, because *mm* in lowercase indicates minutes.
MMMM mmmm	The name of the month. Note that if you use lowercase, you must use mmmm (that is, the letter m in lowercase, four times), because mm (that is, the letter m in lowercase, twice) indicates minutes.
Y	The last digit of the year.
YY	The last two digits of the year.
YYYY	A four-digit year.
hh12	The hour of day in 12-hour format.
hh24	The hour of day in 24-hour format.
hh	The hour of the day. You can specify AM or PM to adjust the time accordingly, for example: hh:mm:ss PM If you do not specify AM or PM, the 24-hour format is used by default.
mm	The minutes. Note that mm (that is, the letter m in lowercase, twice) always indicates minutes and cannot be used to specify a two-digit day of the month.
ss	The seconds.

The following table describes the number formats for the function.

Format Code	Example	Description
#	####	Returns the value with the specified number of digits, with a leading minus sign if the value is negative.

Format Code	Example	Description
0	####.00	Returns leading zeros. Returns trailing zeros.
$	$###.00	Returns the value with a leading dollar sign.
,	#,###	Returns a comma in the specified position. A comma cannot appear to the right of the decimal point. The format model must not begin with a comma.
.	###.##	Returns a decimal point in the specified position. Only one decimal point is allowed in the format parameter. If the number of digits specified after the decimal point is less than the number of digits available after the decimal point, the decimal will be rounded up.

Examples Using Number Formats

The following example returns the value 10:

```
ToChar (10, '##.##')
```

The following example returns the value 10:

```
ToChar (10, '##.00')
```

The following example returns the value 10.24:

```
ToChar (10.2388, '##.00')
```

The following example returns the value -10.24

```
ToChar (-10.2388, '##.##')
```

Examples Using Date Formats

The following example converts the value returned by the Timestamp() function into DD/MM/YYYY format:

```
ToChar(Timestamp(),'DD/MM/YYYY')
```

For example, if the Timestamp() function returns a value of 02/29/2008 10:58:37, the previous expression evaluates to 29/02/2008.

The following examples show how midnight is shown using various formats:

ToChar(Today(), YYYY/MM/DD hh:mm:ss PM) returns 2009/05/22 12:00:00 AM

ToChar(Today(), YYYY/MM/DD hh:mm:ss) returns 2009/05/22 00:00:00

ToChar(Today(), YYYY/MM/DD hh24:mm:ss PM) returns 2009/05/22 00:00:00

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Today

The Today function in Expression Builder returns today's date based on the current user's time zone setting. For example, if the current user's time zone setting is set to Eastern Daylight Time (EDT) -0400 UTC, the Today() function converts the server day to EDT. The Today() function performs UTC (universal time code) conversion.

Syntax

Today()

Result Type

Date

Examples

If the current date is 11/27/2007, the following example:

```
Today() - 30
```

returns the value 10/28/2007.

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Upper

The Upper function in Expression Builder converts all letters in the specified string to uppercase. If there are characters in the string that are not letters, they are unaffected by this function.

Syntax

Upper(string)

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
string	Specifies the string that is to be converted. The value can be a string literal, or a field name, or an expression that returns a string. If the value is a string literal, then it must be enclosed in single or double quotation marks.

Examples

If the First Name field on a contact record contains the value Amanda, then the following example returns the value AMANDA:

```
Upper([{First Name}])
```

The following examples both return the value ACCOUNT123:

```
Upper('Account123')
Upper("Account123")
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

UserValue

The UserValue function in Expression Builder returns the value of a specified attribute for the current user.

The fields on the User Detail view are attributes of the selected user.

Syntax

UserValue('<attribute>')

Result Type

String

Arguments

The following table describes the arguments for the function.

Argument	Description
attribute	The language-independent name or customized integration tag that corresponds to the display name of the current user attribute. Integration tags are displayed in the Integration Tag Web Services v2.0 column in the *record type* Fields page.

Examples

Example1: A business process requires that a custom text field called Origin on a service request is to display by default the country of the user who creates the record (the current user) when the record is created.

To implement the business rule, in the Field Setup page for service requests, set the default value for the Origin field to UserValue('<PersonalCountry>'), and select the Post Default check box.

For information about creating and editing fields, see Creating and Editing Fields (on page 1219).

Example 2: A business process requires that a certain workflow rule is triggered if the owner of an opportunity is not the administrator.

To implement the business rule, set up the following condition on the workflow rule:

UserValue('<EMailAddr>') <> 'administrator@testdata.com'

Attributes

The following table lists the attributes that can be used as arguments in the UserValue function, and their corresponding display names.

Attribute	Display Name	Sample Value
Alias	Alias	Admin
AuthenticationType	Authentication Type	User ID/Password Only
BusinessUnit	Business Unit	Business Unit
BusinessUnitLevel1	Business Unit Level 1	Business Unit L1
BusinessUnitLevel2	Business Unit Level 2	Business Unit L2
BusinessUnitLevel3	Business Unit Level 3	Business Unit L3
BusinessUnitLevel4	Business Unit Level 4	Business Unit L4
CellPhone	Cellular Phone #	+1 555 2368978
CreatedBy	Created By	Oracle CRM On Demand CSR Admin
CreatedById	Not available	1E1263-IZBZ
CreatedDate	Created Date	01/08/2007 21:21:33
CurrencyCode	Currency	USD
Department	Department	Department
Division	Division	Division
EMailAddr	Email	john.doe@oracle.com
EmployeeNumber	Employee Number	12345
EnableTeamContactsSync	Enable Sync of Team Contacts	Y
ExternalIdentifierForSingleSignOn	External Identifier for Single Sign-On	UID=ADMIN,O=ORACLE
ExternalSystemId	External Unique ID	EXTUID123
FirstName	First Name	John
FundApprovalLimit	Fund Approval Limit	50000

Attribute	Display Name	Sample Value
IntegrationId	Integration ID	INTUID123
JobTitle	JobTitle	Product Manager
Language	Language	English-American
LastLoggedIn	Last Sign In	10/31/2007 19:39:01
LastName	Last Name	Doe
LeadLimit	Lead Limit	2345679
Locale	Locale	English - Canada
ManagerFullName	Reports To	John Smith
ManagerId	Not available	1E4763-IZAU
Market	Market	Market
MiddleName	Middle Name	Middle
MiscellaneousNumber1	Miscellaneous Number 1	2312
MiscellaneousNumber2	Miscellaneous Number 2	2312
MiscellaneousText1	Miscellaneous Text 1	DUNS # (Webcat) = 10461
MiscellaneousText2	Miscellaneous Text 2	a7cff064-6566-47a2-8629-8b32d92de222
ModifiedBy	Modified By	John Doe
ModifiedById	Not available	1E1263-IZBZ
ModifiedDate	Modified Date	10/31/2007 19:32:58
MrMrs	Mr./Ms.	Mr.
NeverCall	Never Call	Y
NevereMail	Never Email	Y
NeverMail	Never Mail	Y
PasswordState	Password State	Active

Attribute	Display Name	Sample Value
PersonalCity	City	Toronto
PersonalCountry	Country	Canada
PersonalPostalCode	Postal Code	M4C2C3
PersonalProvince	Province	Ontario
PersonalState	State/Province	CA
PersonalStreetAddress	Street	555 Main Avenue
PersonalStreetAddress2	Address 2	Suite 17
PersonalStreetAddress3	Address 3	Scarborough
PhoneNumber	Work Phone #	+1 555 2365555
PrimaryDivisionName	Primary Division	Asia Division
PrimaryGroup	Primary Group	User Group A
PrimaryPvgName	Not available **NOTE:** The PrimaryPvgName attribute returns the name of the picklist value group that is associated with the user's primary division.	India PVG
Region	Region	My Region
Role	Role	Field Sales Rep
RoleId	Role Id	1E1263-IYG1
SecondaryEmail	Secondary Email	john.doe2@oracle.com
ShowWelcomePage	Show Welcome Page on Sign In	N
Status	Status	Active
SubMarket	Submarket	My submarket
SubRegion	Subregion	My sub region

Attribute	Display Name	Sample Value
TempPasswordFlag	Email Temporary Password When I Click Save	Y
TimeZoneName	Time Zone	(GMT-05:00) Eastern Standard Time (US & Canada)
UserId	Row Id	1E1263-IZAU
UserLoginId	Row Id	1E1263-IZAU
UserSignInId	User Sign In ID	PTE169-14/ADMIN
WorkFax	Work Fax #	+1 555 2365556

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

UtcConvert

The UtcConvert function in Expression Builder converts the specified date and time from the current user's time zone setting, and returns the date and time in the specified time zone.

Syntax

UtcConvert(utc_date_time, time_zone)

Result Type

Time

Arguments

The following table describes the arguments for the function.

Argument	Description
utc_date_time	The date and time according to the current user's time zone setting in the format: MM/DD/YYYY HH24:MI:SS
time_zone	The name of a time zone

Examples

If the current user's time zone setting is (GMT-05:00) Eastern Time (US & Canada), the following example:

```
UtcConvert('12/14/2007 17:07:05', 'Pacific Standard Time')
```

returns the following value:

12/14/2007 12:07:05

If the current user's time zone setting is (GMT+05:30) Calcutta, Chennai, Mumbai, New Delhi, the following example:

```
UtcConvert('12/14/2007 15:07:05', 'Eastern Standard Time')
```

returns the following value:

12/14/2007 04:37:05

The following examples show how to get the corresponding UTC time for Western European Time:

```
UtcConvert(Timestamp(),"(GMT+01:00) Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna")
```

```
UtcConvert(Timestamp(),"W. Europe Daylight Time")
```

```
UtcConvert(Timestamp(),"W. Europe Standard Time")
```

The following examples show how to get the corresponding UTC time for South African Time:

```
UtcConvert(Timestamp(),"(GMT+02:00) Harare, Pretoria")
```

```
UtcConvert(Timestamp(),"South Africa Daylight Time")
```

```
UtcConvert(Timestamp(),"South Africa Standard Time")
```

If the name of a time zone contains a special character, such as a single quotation mark (') or a comma (,), you must enclose the name of the time zone, or the special character, in double quotation marks. For example:

```
%%%UtcConvert('08/03/2009 12:01:33',"(GMT+13:00) Nuku" + "'" + "alofa")%%%
```

```
%%%UtcConvert('08/03/2009 12:01:33', "(GMT+13:00) Nuku'alofa")%%%
```

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

Expression Builder Examples

In Expression Builder, you can use the sample expressions in the following table.

Expression Builder Sample Expressions	
Update the field Opportunity Margin	
Description	Update the field Opportunity Margin.
Syntax	`[{cOpportunityMargin}] = [{Primary Revenue Amount}] - [{cOpportunityCost}]`
Validate new services	
Description	Field Validation. A new service cannot have revenue greater than 1,000,000.

Expression Builder Sample Expressions	
Syntax	`<= IIf (FieldValue('{Type}') = 'New Service', 1000000, [{Primary Revenue Amount}])`
Assign a newly-created service request to the creator	
Description	When a service request is created, set the value of the Alias field on the user record of the current user as the default value for the Owner field on the service request.
Syntax	`[{Owner Alias}] = UserValue('<Alias>')`
Check if the values of specified fields have changed	
Description	Check for changes in field values.
Syntax	`PRE('{Primary Revenue Amount}') <> [{Primary Revenue Amount}]`
Trigger a workflow based on a close date	
Description	If the close date is modified by more than 30 days, execute the workflow.
Syntax	`[{Primary Revenue Close Date}] - PRE('{Primary Revenue Close Date}') > 30`
Trigger a workflow if an opportunity reaches a certain stage without a contact	
Description	If an opportunity reaches the Closed/Won sales stage without having a contact, execute the workflow.
Syntax	`FieldValue('{Sales Stage - Translation}') = "Closed/Won" AND PRE('{Sales Stage - Translation}') <> [{Sales Stage - Translation}] AND [{Key Contact Id}] = "No Match Row Id"`
Trigger a workflow when a check box is selected	
Description	If the custom Ready for Review check box field is selected, execute the workflow.
Syntax	`((FieldValue('{bCust_Ready_For_Review_Check_Box}') = 'Y') AND (PRE('{bCust_Ready_For_Review_Check_Box}') = 'N')) OR (IfNull([{bCust_Ready_For_Review_Check_Box}], 'Y') = 'Y')`
Check whether the current user is the record owner	

Expression Builder Sample Expressions	
Description	Check whether the owner of a record is the current user. In this case, the IfNull function is used because the Owner field might be null.
Syntax	`IfNull([{Owner Alias}], "Invalid") = UserValue('<Alias>')`
Trigger an email when the priority of an account is changed	
Description	Trigger an email when the value in the Account Priority field is changed from Low to High.
Syntax	`(PRE('{Type}') = "Low") AND ( FieldValue('{Type}') = "High")`
Exclude a specific channel from a workflow	
Description	Do not execute a workflow for a record that is updated through a browser window.
Syntax	`PRE('{Customer Target Type}') = "Advertisement" AND ExcludeChannel("Online")`

Related Topics

See the following topics for related Expression Builder information:

- About Expression Builder (on page 1887)
- Using Expression Builder (on page 1887)
- Expression Builder Functions (on page 1900)

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Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit Oracle Global Customer Support Contacts Directory or visit Global Customer Support Accessibility if you are hearing impaired.