Oracle® Sales Cloud Getting Started with Customizations

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Preface

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

Oracle Applications Help

Use the help icon ? to access Oracle Applications Help in the application. If you don’t see any help icons on your page, click the Show Help icon ? in the global area. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community:** Use Oracle Applications Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.

- **Training:** Take courses on Oracle Cloud from Oracle University.

Documentation Accessibility

For information about Oracle's commitment to accessibility, see the Oracle Accessibility Program.

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1 About This Guide

Audience and Scope

This guide provides information on how sales administrators and managers can get started customizing Oracle Sales Cloud. This guide introduces you to simple, common customizations of Oracle Sales Cloud using tools such as Application Composer and Page Composer. Included are user interface basics, information on how to isolate your work while you customize, and an introduction to customizing pages, objects, fields, and other user-interface elements.

You'll also learn about searches, and about how to change Oracle Sales Cloud's look and feel to better fit your needs.

Related Guides

You can refer to the following guides to learn more about customizing Oracle Sales Cloud.

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Related Topics

- Oracle Help Center
2 Introduction to Oracle Sales Cloud Customizations

About Customizations

There may be areas of Oracle Sales Cloud that you want to change to meet your business needs. For example, you might need to add additional reports to a dashboard or you might need to add additional fields to a page. You can accomplish this in Oracle Sales Cloud by customizing pages. You customize pages by editing them at runtime, which means that you can change pages to meet your needs as soon as they arise.

Because changes you make at runtime are seen immediately by users, you must first create a sandbox that is separate from the mainline application to isolate your changes. A sandbox provides an independent development environment so that you can fully test your changes before merging them with the mainline code and making them available to your end users.

This guide introduces the common customization tasks. To learn about all the ways in which you can extend and customize Oracle Sales Cloud, see Extending Sales.

What job role must I have to customize objects in Application Composer?

Users with any one of the three following job roles can create custom objects and use all other Application Composer functions:

- Customer Relationship Management Application Administrator.
- Application Implementation Consultant.
- Master Data Management Application Administrator.

Oracle recommends provisioning the user with the Customer Relationship Management Application Administrator job role (for performing the customizations) and the Custom Objects Administration job role and Sales Administrator job role (for testing the customizations in the Oracle Sales Cloud UI).
3 Understanding the User Interface

Understanding the User Interface

This chapter introduces the Oracle Sales Cloud user interface components. It includes the following topics:

- Understanding User Interface Types
- Understanding Pages Types
- Understanding the Settings and Actions Menu
- Personalizing and Customizing the User Interface

Understanding User Interface Types

There are several types of Oracle Sales Cloud user interfaces. This guide discusses the following interface types:

- Simplified User Interface
- Mobile User Interface
- Desktop User Interface

Oracle Sales Cloud also includes a user interface for integrating with Microsoft Outlook. For more information about the Outlook interface, see Oracle Sales Cloud Customizing Sales.

User Interface Types

Simplified User Interface

The simplified user interface provides quick access to high-volume, self-service tasks from any device.

The following figure shows an example of a simplified user interface page. The group of icons across the top of the page is called a springboard. The springboard appears on all simplified user interface pages. You use the springboard to access
functional areas, such as Leads, Navigator, and Settings, as well as work area pages where you can review and edit data for objects within an area, such as a specific sales opportunity.

Mobile Interface

The mobile interface is optimized for handheld and mobile devices and provides quick access to select information and high-level tasks. From the main list page, you can drill down to the data in a functional area.

From the main mobile page, you can access functional areas and the associated pages where you can review and edit data for objects within an area. You can also access functional areas by clicking the menu in the upper left corner.

Desktop User Interface: Explained

The desktop User Interface is optimized for large screen displays and is for tasks that are most commonly performed on a desktop computer by a user needing an interface that brings together lots of information and actions in one place.
The set of icons that appears across the top of the page is called the global area. It appears on every desktop page.

Understanding Page Types

How you customize a page depends on its type. This section describes the types of pages that you can customize.

- Dashboards: The desktop user interface contains dashboard pages, such as the Sales dashboard shown in the following figure. Dashboards display reports, graphs, and other information that is relevant to you and your job role.
Springboards: The simplified and mobile interfaces include a springboard that provides quick access to functional areas. The springboard appears on all simplified user interface pages. The following figure shows the springboard on the main page in the simplified User Interface.

Work areas, such as the Opportunities work area shown in the following figure, display information about objects. Objects store information about people, places, and things, such as accounts and opportunities. The pieces of information that describe these objects, such as a contact’s name or address, are called attributes. The object’s attributes are displayed on the work area pages as fields.

Work areas are typically composed of several pages, such as an overview page that contains a local search area and a summary table, a create page, and an edit page.

On desktop pages, the left side of work areas often contains a regional area from which you can start tasks or search for objects, as shown in the following figure.
Understanding the Settings and Actions Menu

Some of the customization tasks that you learn about in this guide are accessed from the Settings and Actions menu. To access the Settings and Actions menu, click the name of the current user, as shown in the following figure. The figure shown below is the Settings and Actions menu in the simplified user interface. It displays a subset of the options available through the desktop interface.

Personalizing and Customizing the User Interface

All users can personalize their own workspace in certain ways. Administrators can make changes to the user interface (UI) for all users or users with particular roles:

- **Personalization:** Every user of Oracle Fusion Applications can make changes to certain UI elements at run time. These changes remain for that user each time that user signs in to the application. Personalization includes changes based on user behavior (such as changing the width of a column in a table), changes the user elects to save, such as search parameters, or composer-based personalizations, where a user can redesign aspects of a page. For composer-based personalizations, Oracle Fusion Applications includes Page Composer, which enables users to change certain UI pages to suit their needs. For example, they can rearrange certain objects on a page, and add or remove designated content.

- **Customizations and extensions:** Administrators can customize and extend Oracle Fusion Applications at run time using browser-based composers and other tools. These customizations and extensions are visible and usable by all or by a subset of Oracle Fusion Applications users. Customizations and extensions range from changing the look and feel of a page, to customizing standard objects, adding a new object and associated pages and application functionality, changing workflows, defining security for new objects, and customizing reports. Access to run time customization tools depends on your roles. If you’re assigned a role with an administrative privilege, then you can access most run time customization tasks.
4 Isolating Your Work In Progress

Isolating Your Work In Progress

To prevent disruption for users of the sales application, you must isolate the changes you make until your changes are complete and fully tested. A sandbox provides an independent development environment so that you can fully test your changes before merging them with the main application and making them available to your end users. Only people who connect to your sandbox (make the sandbox active) can see the changes that you make. This section describes how to work with sandboxes and includes the following topics:

- Understanding Sandboxes
- Making a Sandbox Active
- Working with Multiple Users
- Isolating Your Work in Progress: Next Steps

Requirement When Customizing Sandboxes

In a sandbox, you can implement and test your changes without affecting other users. For example, if you are adding fields to a page, you don’t want others to see your work until you have added all the fields. To prevent others from seeing your changes, you work in a sandbox. To work in a sandbox, you create a sandbox and make it active. Anyone who makes a sandbox active can see the changes that are made in that sandbox. When a sandbox is published, the changes that are made in that sandbox are visible to all users who have the permissions to view the affected pages and fields.

Use the Sandbox Manager to access sandboxes. If you don’t see Sandbox Manager in the Settings and Actions menu, contact your application administrator to be granted access to the tool.

You must adhere to the following when making customizations in a sandbox:

1. Follow your company’s policies and procedures to obtain a sandbox to work in.
2. Activate the sandbox that you have obtained, as described in Making a Sandbox Active.
3. Make your customizations in the sandbox.
4. Test the customizations in the sandbox.
5. Follow your company’s policies and procedures for having a sandbox published and having the changes moved to a production environment.

🏷 Note: To make customizations to most tasks in Application Composer, you must be in an active sandbox. If you aren’t in a sandbox, tasks you can’t customize won’t be available for selection.

After a sandbox is published, you cannot reverse any changes easily. Before making a sandbox active and making any changes, you must understand how your actions can affect all of the users of the application. In addition to
planning and designing changes before you make them, adhering to the following principles ensures that you use sandboxes effectively:

- Perform all customizations in a staging (test) instance of the environment. Use Customization Set Migration to move content to the production instance. See Exporting and Importing Customizations in Customizing Sales for more information.
- Always work in a sandbox whenever your customizations affect other users, such as creating objects and fields, changing the look and feel of pages, and customizing user interface text.
- After you have made customizations that you want to integrate with the main line code, request that a sandbox administrator review and publish the sandbox, using your company’s best practices and procedures.

Note: A sandbox isolates changes, such as object definitions, made within the sandbox itself. Some changes, such as registering a new object or field name, are made in the database outside the sandbox and remain after you delete the sandbox. You cannot use an existing name for a newly created object or field, even if you delete the sandbox in which the name was first created.

### Making a Sandbox Active: Explained

You must make a sandbox active before you can make any changes within that sandbox.

### Making a Sandbox Active

You must also make a sandbox active before you can see and test customizations made by another user before the changes have been published.

Note: Always follow your company’s policies and procedures to obtain a sandbox to work in.

To make a sandbox active:

1. From the Administration group in the Settings and Actions menu, select Manage Sandboxes.
2. Select the sandbox that you want to use and click Set as Active.
3. From the Settings and Actions menu, select Sign Out. Every time that you make a sandbox active, you must sign out and sign in again to clear your cache.
4. After you sign in again to the application, the name of the active sandbox appears at the top of each page.

### Working with Multiple Users

The easiest way to avoid conflicts caused by multiple users modifying the resources in a sandbox is to have only one user work in the sandbox at one time. If you must have multiple users working in a sandbox at the same time, follow these guidelines to avoid conflicts:

- Multiple concurrent users in the same sandbox must operate only on different and unrelated objects.
For example, if user1 updates object1, then user2 can update object2 but should not update object1. Remember that if both modifications involve changes to translatable strings, then saving changes to separate objects around the same time may still cause a conflict in the resource bundle that stores the translatable strings.

- If multiple users update the same artifact concurrently (either the same object or the same underlying frequently modified file), then they will get a concurrent update error. In this case, the second user’s updates will not be saved (the Save button will be disabled) and one of the users will have to cancel and try again.

**Isolating Your Work in Progress: Next Steps**

For more information about using sandboxes, see Application Composer: Using Sandboxes in Customizing Sales.
5 Customizing Dashboards and Springboards

Understanding Customization Layers

Oracle Sales Cloud provides a hierarchy of layers that lets you specify whether you want to apply a customization to certain instances or users of an application. The arrangement of layers represents an order of precedence where the more specific layer takes precedence over the more general layer. For example, you could choose to hide a field or a group of fields for all general users, but show the fields for certain user roles.

For certain types of customizations, you must select a layer:

- Site: Customizations affect all users.
- Internal or External: Customizations affect only secured, internal users (those with a role definition) or unsecured, external users.
- Job Role: Customizations affect users with the selected role.

How to Use These Exercises

The exercises in this section require that you modify the user interface. Because your changes can affect other users, follow these guidelines:

- Ensure that you are in an active sandbox.
- When you finish the exercises that require working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Customizing Simplified User Interface Springboards

The springboard in the simplified user interface displays icons for the functional areas in the application, and appears on all pages in the interface. You can change the order of the icons, modify their labels, and show or hide icons. You can also change some display features of the simplified user interface. For more information, see Changing the Look and Feel of Oracle Sales Cloud.

To modify the springboard:

1. Click Structure under Tools in the Navigator. The Structure page displays all the functional areas and pages that are currently selected to appear on the springboard.
2. To display functional areas on the springboard, click Create, select Create Category, and add the information for the new functional area.
3. To hide a functional area, click that functional area, then select No in the Visible field.
4. To display a page in a functional area, click Create, select Create Page Entry, and specify the information about the page, including what functional area it should appear under. Not all functional areas allow modifications.
5. To hide a page, click that page and then select No in the Visible field.
6. To change the order of items, select the row containing the item you want to change, then click the up or down arrow next to the item.
7. To rename an item, click the name of a functional area or page and modify its name.

Customizing Desktop User Interface Dashboards

Dashboards in the desktop user interface display information that is relevant to the user and the user’s job role, such as reports and graphs. You can customize a desktop dashboard by changing its layout and by adding content, such as web pages, reports, or calendars. You can add the content to an existing tab or add more tabs.

Topics:
- Changing the Layout on a Dashboard
- Adding a Web Page to a Dashboard
- Adding a Report or a Graph to a Dashboard
- Adding a Calendar to a Dashboard
- Adding a Tab to a Dashboard

Changing the Layout on a Dashboard

A dashboard is composed of boxes, each of which contains content such as reports or summary tables. Use layouts to arrange how the dashboard displays these boxes. For example, the dashboard can display the boxes in two columns or three columns. There are several layouts to choose from.

You can move content on a dashboard from one layout section to another. For example, you can click and drag content from the first column to the second column in a two-column layout.

To change a dashboard layout:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. Go to the dashboard that you want to change.
3. In the global area, click your name. Then, from the Administration group in the Settings and Actions menu, select Customize Work area Pages or Customize Home Pages, depending on the dashboard that you are customizing.
4. In the Customize Pages dialog box, select the layer under Edit for which you want the changed label to display: Site, External or Internal, or Job Role. If you select Job Role, specify the job role for which you want the change to display. For more information about layers, see Understanding Customization Layers.
5. Select Include for a layer to temporarily see the customizations defined for that layer while you edit the dashboard.
6. Click OK.
7. Click Change Layout.
8. Click the desired layout.
9. To move content on a dashboard, either:
   - Click the title of the content, and drag the content to the desired column position. For example, click the My Activities title text to drag the My Activities component from one column to another.
   - From the component’s Actions menu, select Move Up or Move Down to move the box up or down in the dashboard’s layout.
10. To save your changes and exit the tool, click Close.

>Note: Selecting Reset to Default Content and Layout from the Personalization group in the Settings and Actions menu restores the dashboard to the originally provided content and layout.

Try It

Ensure that you are working in a sandbox. Change the layout of the Welcome dashboard to two columns of equal width. Move the My Activities component on the Welcome dashboard to the top position in the left column. Restore the dashboard to the original layout by selecting Reset to Default Content and Layout from the Personalization group in the Settings and Actions menu.

When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Adding a Web Page to a Dashboard

You can display a web page in a dashboard box. For example, you can display a page from your company’s website, from a partner’s website, from a map website, or from a world clock website, as shown in the following figure.

You add a web page box from the Resource Library. The Resource Library collects all of the content that can be added to desktop pages with Page Composer, such as text boxes, links, and web page boxes.

To display a web page in a dashboard box:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. Go to the dashboard.
3. In the global area, click your name. Then, from the Administration group in the Settings and Actions menu, select Customize Pages or Customize Home Pages, depending on the dashboard that you are customizing.
4. In the **Customize Pages** dialog box, select the layer under **Edit** for which you want the changed label to display - **Site**, **External** or **Internal**, or **Job Role**. If you select **Job Role**, specify the job role for which you want the change to display. For more information about layers, see Understanding Customization Layers.

5. Select **Include** for a layer to temporarily see the customizations defined for that layer while you edit the dashboard.

6. Click **OK**.

7. In a box on the dashboard, click **Add Content**.

8. Open **Components**.

9. Click **Add**, next to Web Page, as shown in the following figure.

10. Click **Close**.

11. In the newly added Web Page box, click **Edit**.

12. In the **Source** field, enter the URL, such as https://education.oracle.com.

13. Click **OK**.

14. If the Web page does not display:
   - Ensure that you use a secure address, if it is available. That is, use an address that begins with https. For example, use https://www.example.com instead of http://www.example.com.
   - If the page does not have a secure address, you must override your browser’s security settings to display this page. If you are sure it is safe to display the page, follow your browser’s procedures for displaying this content. For example, when using Mozilla Firefox, click the shield icon and disable protection for the page, as shown in the following figure.
Note: If the owner of a page does not allow it to be displayed using the IFRAME HTML element, it will not load on the dashboard. Also, some browsers do not display unsecured Web pages in IFRAME HTML elements.

15. (Optional) From the component’s Actions menu, select Move Up or Move Down to move the Web Page box up or down in the dashboard’s layout.
16. Click Close.

Try It
Ensure that you are working in a sandbox. Add a web page component to the Welcome dashboard that displays https://education.oracle.com. Review the changes. Then, edit the dashboard, and remove the web page by clicking its Remove icon.

When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Adding a Report or a Graph to a Dashboard

Oracle Sales Cloud provides several ready-to-use reports and graphs, such as Leads at a Glance and Forecasted Revenue by Customer. You can create additional reports. You can add any of these reports to a dashboard:

To add a report to a dashboard:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. Go to the dashboard.
3. In the global area, click your name. Then, from the Administration group in the Settings and Actions menu, select Customize Work area Pages or Customize Home Pages, depending on the dashboard that you are customizing.
4. In the Customize Pages dialog box, select the layer under Edit for which you want the changed label to display: Site, External or Internal, or Job Role. If you select Job Role, specify the job role for which you want the change to display. For more information about layers, see Understanding Customization Layers.
5. Select Include for a layer to temporarily see the customizations defined for that layer while you edit the dashboard.
6. Click OK.
7. In a box on the dashboard, click Add Content.
8. Open Reports and Analytics.
9. Open the type of report that you want to add, such as Shared Marketing Reports.
10. Drill down to the report or graph, and then click Add.
11. Click Close.
12. (Optional) If a Parameters button is displayed, click the button and provide values on which to filter the report, such as a specific lead status.
13. (Optional) Click the Edit icon, and, in the Display Options tab, replace the text in the Text field with a different heading, such as Quick Glance: Leads.
14. (Optional) From the Actions menu, select Move Up or Move Down to move the report up or down in the dashboard’s layout.

15. Click Close.

Try It

Ensure that you are working in a sandbox. Edit the Welcome dashboard and then explore the Oracle Business Intelligence reports that are available to add to the dashboard. Try adding one or two and rearranging them on the dashboard.

When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Adding a Tab to a Dashboard

A dashboard is composed of one or more tabs. You can add additional tabs to group similar information together.

✓ Note: You cannot add a tab to the Welcome dashboard.

Adding a Tab to a Dashboard

To add a tab to a dashboard:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.

2. Go to the dashboard.

3. In the global area, click your name. Then, from the Administration group in the Settings and Actions menu, select Customize Pages or Customize Home Pages, depending on the dashboard that you are customizing.

4. In the Customize Pages dialog box, select the layer under Edit for which you want the changed label to display: Site, External or Internal, or Job Role. If you select Job Role, specify the job role for which you want the change to display. For more information about layers, see Understanding Customization Layers.

5. Select Include for a layer to temporarily see the customizations defined for that layer while you edit the dashboard.

6. Click OK.

7. Click + Tab tab.

8. In the field, enter the name of the tab, and then click Rename This Tab, as shown in the following figure.

9. (Optional) Add content to the tab.
10. Click **Close**.

**Try It**

1. Ensure that you are working in a sandbox. Add a tab named **My Tab** to the Sales dashboard.
2. Add some content to the tab. Review your changes. Then edit the dashboard, and remove the tab from the dashboard by clicking **My Tab**, and then clicking **Remove This Tab**.
3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.
6 Working with Objects and Fields

Working with Objects and Fields

Oracle Sales Cloud includes standard objects which account for many business needs and scenarios. If you have a unique business component for which you want to capture information in Oracle Sales Cloud, you can create a custom object. If you need to capture an additional attribute for an object, you can add a custom field to that object. This section describes how to extend the Oracle Sales Cloud data model by creating custom objects. It also describes how to add the two most common types of fields, a text field and a fixed choice field.

The following topics are covered:

- How to Use These Exercises
- Creating a Custom Object
- Set or Change Object Security
- Changing an Object’s Icon
- Adding a Text Field
- Adding a Fixed Choice List Field
- What’s Next

Note: Before creating a custom object or field, consider that some of the properties cannot be changed after creation, such as the internal object name or field name. Ensure that custom objects fields are tested and reviewed before sandboxes that contain them are published.

How to Use These Exercises

The exercises in this section require that you modify the user interface. Because your changes can affect other users, follow these guidelines:

- Ensure that you are in an active sandbox.
- When you finish the exercises that require working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Recall that some changes, such as new field and object names, are registered outside of the sandbox and remain even after the sandbox is deleted. Although you can change the display label for a field, you cannot change the registered name for a field after it is created. Consider how you will name objects and fields before you begin, and how the names will read in scripts.

Field values can be simple values of a particular type, or they can include or script language that must be evaluated to display the field or its value.

Groovy is a dynamic scripting language for the Java platform. You can write Groovy scripts in Application Composer to interact with existing objects and their fields. Examples of the tasks that you can accomplish with Groovy scripts include...
calculating custom field values, creating dynamic URLs from a field’s value, and using a field’s value to create conditions that trigger dynamic page layouts. Groovy scripts are evaluated at run time. See Application Composer: Using Groovy Scripts in Customizing Sales for more information.

Creating a Custom Object

If you want to capture information about something that is unique to your business and not represented by the provided objects, such as a support ticket to capture partner issues, then create a custom object.

After you create the custom object, set security to specify how user can access the object, add fields to capture needed attributes, display the object in a work area page so users can interact with object records and create saved searches for the object. See the following sections for more information:

- Set or Change Object Security
- Changing an Object’s Icon
- Adding a Text Field or Adding a Fixed Choice List Field
- Adding Summary, Create, and Detail Desktop Pages for a Custom Object
- Creating a Saved Search for an Object

Use Application Composer to add the object to the data model.

Users with any one of the three following job roles can create custom objects and use all other Application Composer functions:

- Customer Relationship Management Application Administrator.
- Application Implementation Consultant.
- Master Data Management Application Administrator.

Oracle recommends provisioning the user with the Customer Relationship Management Application Administrator job role (for performing the customizations) and the Custom Objects Administration job role and Sales Administrator job role (for testing the customizations in the Oracle Sales Cloud UI).

Creating a Custom Object

To create a custom object:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application in which you want to create the object.
4. In the Objects tree, click the Create icon next to Custom Objects.
5. In the Create Custom Objects dialog box, provide the information that is shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Label</td>
<td>The label to display for the object. This label is used for the title of the object’s work area.</td>
</tr>
<tr>
<td>Plural Label</td>
<td>The label to display for multiple instances of the object. This label is used as the search string in the regional search and as the saved search in the local search.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Record Name Label</td>
<td>The label for the field that uniquely identifies an instance. This is typically the object’s primary user-recognizable identifier.</td>
</tr>
<tr>
<td>Record Name Data Type</td>
<td>The data type for the Record Name field</td>
</tr>
<tr>
<td>Object Name</td>
<td>An identifier for the object. The name must be unique to the system, including names of objects that have not yet been published. The application programming interface (API) name that you use to identify the object in Groovy expressions is derived from this name. See Application Composer: Using Groovy Scripts in Customizing Sales for more information.</td>
</tr>
</tbody>
</table>

**Note:** You can only use a custom object’s internal (object) name once across the mainline code and all existing sandboxes. If you’ve previously used an object’s internal name in a sandbox, you can reuse that same internal name, but you must first you delete all other sandboxes where the internal name was previously used.

You can use a custom object’s display name as many times as you want across sandboxes. The restriction applies only to the internal name.

| Description | Optional description of the object. |

6. Click OK.
7. Verify that the new object appears in the Custom Objects tree in the regional area of Application Composer.

**Try It**

Create an object as described in the following steps:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. Create a custom object in the Sales application with a **Display Label** of **Support Ticket**.
3. Because the internal name of an object is never deleted and cannot be reused, set the name of the object to **SupportTicket_yourinitials_mmdd**, where **yourinitials** is your initials and **mmdd** is the current month and day. Appending your initials and the current date to the end of a test object name is a good way to ensure the same name is not likely to be needed by other users.
4. Set the **Record Name Label** as **Support Ticket Name**.
5. Verify that the object appears in Application Composer.

When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

**Setting or Changing Object Security**

Use the Define Policies page to specify which roles can perform create, view, and update the object’s data, as well as grant access to other roles.
Note: Before you change security settings, make sure you know the role assigned to your user name. When changing permissions, make sure that you do not remove the privileges from your role that are necessary to view and update the object.

Setting or Changing Object Security

To set or change object security:

1. In the regional area, expand the custom object and select Security.
2. On the Define Policies page, use the check boxes to specify which roles can perform each action. To enable all roles for a specific action, select the check box in the top row of that action’s column, as shown in the View column in the following figure.

Ensure that you have the necessary privileges to view and test the pages.

Changing an Object's Icon

This section describes how to change an icon associated with a custom object.

Changing an Icon

To change the icon associated with a custom object:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application that contains the object you want to customize.
4. In the regional area, expand Custom Objects and select the object whose icon you want to change.
5. In the Overview area for the object, under Display Icon, click the Change Icon link next to the icon currently used for the object.
6. Select an icon from the list of icons shown.
Try It

1. Ensure that you are working in a sandbox. Use Application Composer to locate and open the custom object at the Overview (object) level. Search for and select a different icon for the custom object.
2. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Adding a Text Field

You can add a text field to capture strings. For example, you can add a text field to a support ticket object to store the name of the employee that a ticket was assigned to.

Use Application Composer to add a text field.

Note: Before creating a field, consider that a field’s Name and API Name cannot be changed after it is created. Even if the Display Label changes, the name used to refer to this field in Groovy expressions will not change.

Adding a Text Field

To add a text field:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application in which you want to add the field.
4. In the regional area, expand Standard Objects or expand Custom Objects, depending on which type of object you are working with.

   Note that the Standard Objects tree displays only the standard objects that you can customize.
5. Expand the object to which you want to add the field.
6. To display the Fields page, select Fields.
7. In the Custom tab of the Fields page, select Create from the Action menu.
8. In the Select Field Type dialog box, select Text and click OK.
9. In the Create page, shown in the following figure, enter the information for the field. You must enter values into the Display Label and Name fields.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Label</td>
<td>The label to display for the field</td>
</tr>
<tr>
<td>Help Text</td>
<td>The information to display in the tool tip</td>
</tr>
<tr>
<td>Display Width</td>
<td>The character width for the field</td>
</tr>
<tr>
<td>Display Type</td>
<td>Determines the type of text field to be displayed. Simple Text Box is a single-line text field, while Multiline Text Area is a larger text area that spans multiple lines.</td>
</tr>
<tr>
<td>Name</td>
<td>An identifier for the field. The name must be unique for the object. This field is used for internal purposes. The application programming interface (API) name that you use to identify the field in Groovy expressions is derived from this name.</td>
</tr>
<tr>
<td>Description</td>
<td>Optional description of the object. This field is used for internal purposes.</td>
</tr>
<tr>
<td>Required</td>
<td>Indicates if the field is required. Optionally, use the expression builder to write an expression that specifies when the field must be required.</td>
</tr>
<tr>
<td>Updatable</td>
<td>Indicates if the field is updatable. Optionally, use the expression builder to write an expression that specifies when the field can be updated.</td>
</tr>
</tbody>
</table>
### Property | Description
--- | ---
Searchable | Indicates whether to make the field available for selection as additional search criteria in the Add Fields list in Advanced Search mode.
Indexed | Enables faster searching. A limited number of columns can be indexed. Select this check box for only the most frequently searched fields. You cannot modify this property after the field is created.
Include in Service Payload | Indicates whether the field value can be included in a web service request or response.
Minimum Length | Indicates the minimum number of characters allowed in the text field.
Maximum Length | Indicates the maximum number of characters allowed in the text field.
Fixed Value | A literal default value for the field. Do not enter a fixed value if the field is both required and intended to be unique because that causes runtime errors.
Expression | An expression that dynamically sets the default value.

10. Click **OK**.

### Try It

1. Ensure that you are working in a sandbox. Add a text field to the Service Request object with the following properties:
   - **Display Label**: Assigned To
   - **Help Text**: The user to whom this ticket is currently assigned
   - **Display Type**: Select Simple Text Box
   - **Name**: AssignedTo
   - **Constraints**: Select the **Required**, **Updatable**, **Searchable**, and **Include in Service Payload** check boxes.
2. Save the changes, and then review the field’s properties in the **Fields** page of the Service Request object.
3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

### Adding a Fixed Choice List Field

If you want to add a field where users select an option from a fixed list of choices, such as the status of a support ticket, you can add a fixed choice list field to a standard or custom object to capture an option from a set list. This option can be set when creating or editing an object record.

**Note:** Before creating a field, consider that a field’s **Name** and **API Name** cannot be changed after it is created. Even if the **Display Label** changes, the name used to refer to this field in Groovy expressions will not change.
Use Application Composer to create a fixed choice list field.

This section covers the following topics:

- Create and Describe the Fixed Choice List Field
- Create the Lookup Type

Creating and Describing the Fixed Choice List Field

To create and describe the fixed choice list field:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application in which you want to add the field.
4. In the regional area, expand Standard Objects or expand Custom Objects, depending on which type of object you are working with.
5. Expand the object to which you want to add the field.
6. To display the Fields page, select Fields.
7. In the Custom tab of the Fields page, from the Action menu, select Create.
8. In the Select Field Type dialog box, select Choice List (Fixed), and click OK.
9. In the Create page, enter the basic information for the field, such as Display Label, Name, and the Constraints, as shown in the following figure.
10. Select the display type:
    - If the users can select only one value, then select Single Select Choice List.
    - If the users can select more than one value, then select Multiple Select Choice List.
11. If the lookup type was previously defined, click the Search icon that is next to the Lookup Type field, search for the lookup type, select it, and click OK. Otherwise, create the lookup type as described in the next task.

Creating the Lookup Type

If the lookup type was not defined, then use the Create Lookup Type dialog box to add it and to specify the list of values. Note that you can reuse lookup types for other fields.

✍ Note: Although you are working in a sandbox, lookup types are created outside of a sandbox and become part of the mainline metadata.

To create the lookup type:

1. Click the Create a New Lookup Type icon that is displayed next to the Lookup Type field to open the Create Lookup Type dialog box.
2. Enter the properties listed in the following table.
### Property

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meaning</td>
<td>A unique name for the lookup type. Use a name that enables others to search for a lookup type that meets their needs for other fixed choice fields.</td>
</tr>
<tr>
<td>Description</td>
<td>Optional description that enables others to determine if the lookup type meets their needs for other fixed choice fields.</td>
</tr>
<tr>
<td>Lookup Type</td>
<td>A unique internal identifier for this lookup.</td>
</tr>
</tbody>
</table>

3. In the **Lookup Codes** table, from the **Action** menu, choose **Create** to add an item to the list of valid values.
4. In the **Meaning** column, enter the value to display in the list of valid values. The value must be unique to the list.
5. In the **Lookup Code** column, enter the internal code for the item. The value must be unique to the list. To make it obvious in Groovy scripts that the lookup code is not a string that is displayed in the interface, do not use lower-case letters or spaces.
6. (Optional) Enter the **Display Sequence** and **Description**.
7. Create additional items to complete the list.
8. Click **Save**.
9. Click **Save and Close**.

### Try It

1. Ensure that you are working in a sandbox.
2. Add a fixed choice list field to the Support Ticket object with the following properties:
   - **Display Label**: Status
   - **Help Text**: Current Status of the Support Ticket
   - **Display Type**: Select Single Select Choice List
   - **Name**: Status
   - **Constraints**: Select the Required, Updatable, Searchable, and Include in Service Payload check boxes.
   - **List of Values**: Search for and select any status-related lookup type that will suffice for this exercise.
3. Save the changes, and then review the field’s properties in the Fields page of the Support Ticket object.
4. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

### What's Next

See the following resources for more information about the concepts, tools, and procedures described in this section:

- Documentation about creating objects.
  - Application Composer: Using the Application Composer in Customizing Sales.
- Documentation about defining fields in Application Composer.
Defining Fields: Explained in Customizing Sales
7 Working with Pages

Working with Pages: Overview

From an object’s pages, you can view, create, and edit object records, such as a single sales Opportunity record associated with the Opportunity object. This section discusses customizing simplified, mobile, and desktop pages for standard and custom objects.

Includes the following topics:

- Understanding the Tools for Customizing Pages
- Working with Simplified Pages
- Working with Mobile Pages
- Working with Desktop Pages
- Adding, Deleting, and Moving Columns in a Summary Table
- Showing and Hiding Fields by Job Role on a Page
- Changing a Field Label on a Specific Page
- Changing a Field Label on All Pages
- Adding Link Text to a Page
- Adding a Link Button to a Page
- Learn More

Understanding the Tools for Customizing Pages

You have two tools for working with pages:

- **Application Composer**: Use this tool to create and maintain user interface pages for objects and to add and remove fields on a page.

- **Page Composer**: Use this tool to make a change that’s specific to a job role, or if you want to make a field change to only the internal or external version of a page. Also use this tool if you want to make a site-wide change to the field only on a specific page. The field changes that you can make with this tool are:
  
  - Make a field required
  - Show or hide a field
  - Change a field label
  - Make a field read-only
  - Reorder fields

The changes affect the field only on the page where you make the change and only for the specified level (site, job role, internal, or external).
Also use this tool to create saved searches and to modify saved search attributes, such as whether to use as the default or run automatically. Saved searches are described in Working with Searches.

Working with Simplified Pages

You can customize simplified pages in the following ways:

- Adding Landing, Create, and Detail Simplified Pages for a Custom Object
- Adding a Custom Field to a Simplified Page
- Adding a Field Group to a Simplified Page
- Adding an External Web Content Subtab to a Simplified Page

Adding Landing, Create, and Detail Simplified Pages for a Custom Object

After you create a custom object, you must create pages to enable others to view, create, and edit information about that object. To do this, create a work area for each of the page types in which you want to display the object, such as simplified, mobile, or desktop pages.

The following topics are covered in this section:

- Creating Default Simplified Pages
- Configuring the Landing Page
- Configuring the Creation Page
- Configuring the Details Page

Creating Default Simplified Pages

To create default simplified pages:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools category in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application where you created the custom object.
4. In the regional area, expand Custom Objects.
5. Expand the object for which you want to create the work area.
6. To display the Pages page, select Pages.
7. Select the Simplified Pages tab, and then click Create Default Pages.
Configuring the Landing Page

The Landing page, also called the summary or list page, provides a high-level overview of the object that includes a summary table with a filtered list of the object’s data and buttons that perform actions such as creating a new record. The user can click an item in the drill-down column to view that record’s details.

To configure the landing page:

1. From the Simplified Pages tab, in the Landing Page Layouts region, edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout.
2. Click the Edit icon next to Summary Table.
3. From the Drill Down Column list, select the field that the end user can select to view the detail page. This should be a field that enables the end user to uniquely identify the record, such as the Record Name field.
4. In the Configure Summary Table region, move the fields that you want to appear in the summary table to the Selected Fields list, as shown in the following figure.
5. Use the arrows to the right of the list to specify the order in which the fields appear.
6. In the Configure Detail Form: Buttons and Actions region, move the action buttons that you want to appear on the summary page to the Selected Buttons list. The buttons appear in the tool bar on the Summary page.
7. Use the arrows to the right of the list to specify the order in which the buttons appear.
8. Click Save and Close.
9. Click Done.

Configuring the Creation Page

To specify the fields to include on the creation page used when a user creates a new record for the object:

1. From the Simplified Pages tab, in the Creation Page Layouts region, edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout.

   ✨ Note: You cannot edit the standard layout. Instead, duplicate a standard layout to create custom layouts, which you can configure as needed, and then control its availability to users by assigning role, record type, or advanced expression conditions.

2. Click the Edit icon next to <Object name> Create.
3. In the Configure Detail Form region, move the fields that you want to appear on the creation page to the Selected Fields list.
4. Use the arrows to the right of the list to specify the order in which the fields appear.
5. Click Save and Close.
6. Click Done.

Configuring the Details Page

To specify the fields to include on the details page:

1. From the Simplified Pages tab, in the Details Page Layouts region, edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout. For example:
Note: You cannot edit the standard layout. Instead, duplicate a standard layout to create custom layouts, which you can configure as needed, and then control its availability to users by assigning role, record type, or advanced expression conditions.

2. Under the Subtabs Region, on the Summary subtab, click the edit icon next to Summary.
3. In the Configure Detail Form region, move the fields that you want to appear on the details page to the Selected Fields list.
4. Use the arrows to the right of the list to specify the order in which the fields appear.
5. Click Save and Close.
6. Click Done.

Try It

1. Create simplified pages for the Support Ticket object, created in the Try It example for Creating a Custom Object, that meets the following specifications.
   a. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
   b. The icon for the page must appear in the springboard. The icon must be labeled Support Ticket.
   c. The landing page must include the following fields:
      - Creation Date
      - Last Update Date
      - Last Updated By
   d. The creation page must include the following fields.
      - Support Ticket Name
      - Created By
      - Creation Date
   e. The Created By field must display on the details page.
   f. After you create the pages, you must set security to specify the type of access different user roles have to the pages. For this challenge, make sure that the sales VP Duty role must have full privileges to create, view, update, delete, view all, and update all for this object. All other roles must be able to view this object. For more information, see Set or Change Object Security.
2. After you save your changes, sign in to the simplified user interface, use the springboard to go to the new pages for this object, and then review the pages.
3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Adding a Custom Field to a Simplified Page

You can add custom fields to summary tables, creation pages, and detail pages for objects with simplified pages. For example, you can add the Internal Comments field to the Support Ticket object’s creation and detail pages.

Note: Some objects may not include simplified pages.
Adding a Custom Field to a Simplified Page

To add a custom field to a simplified page:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application that contains the object you want to customize.
4. In the regional area, expand Standard Objects or expand Custom Objects, depending on which type of object you are working with.
   
   Note that the Standard Objects tree displays only the standard objects that you can customize.
5. Expand the object to which you want to add the field.
6. Select Pages, then select the Simplified Pages tab.
7. To add the field to the summary table:
   b. Click the Edit icon next to Summary Table.
   c. Move the fields that you want to add to the summary table from the Available Fields list to the Selected Fields list.
   d. (Optional) Use the arrows to the right of the Selected Fields list to specify the order in which the fields appear in the summary table.
   e. Click Save and Close.
   f. Click Done.
8. To add the field to the creation page:
   a. Click Default custom layout under Creation Page Layouts.
   b. Click the Edit icon next to the name of the layout you want to edit.
   c. Move the fields that you want to add to the creation page from the Available Fields list to the Selected Fields list.
   d. (Optional) Use the arrows to the right of the Selected Fields list to specify the order in which the fields appear in the summary table.
   e. Click Save and Close, and then click Done.
9. To add the field to the detail page:
   a. Under Details Page Layouts, click Default custom layout.
   b. Select the layout that you want to add the field to, and click the Edit icon.
   c. Select the subtab that you want to add the custom field to (for example, Summary), and click the Edit icon.
   
   \[\text{Note:}\] Not all subtabs are customizable.
   
   d. If applicable, move the fields that you want to add to the default summary region from the Available Fields list to the Selected Fields list in the Configure Default Summary group.
   
   Fields that appear in the Selected Fields list in the Configure Default Summary group cannot appear in the Selected Fields list in the Configure Detailed Summary group and vice versa.
   
   e. If applicable, move the fields that you want to add to the detailed summary region from the Available Fields list to the Selected Fields list in the Configure Detailed Summary group.
   
   f. (Optional) Use the arrows to the right of the Selected Fields list to specify the order in which the fields appear in each region.
Try It

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. In the Try It example for Adding Landing, Create, and Detail Simplified Pages for a Custom Object, you created a summary table on the Support Ticket object’s page. Add the Assigned To text field that was created in the Try It example for Adding a Text Field to this summary table. Review the changes.
3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Adding a Field Group to a Simplified Page

You can group fields on a simplified page to help organize the content on the page. Users can optionally expand or collapse the group to show or hide the fields.

Note: Some objects may not include simplified pages.

Adding a Field Group to a Simplified Page

To add a field group to a simplified page:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application that contains the object you want to customize.
4. In the regional area, expand Standard Objects or expand Custom Objects, depending on which type of object you are working with.

Note that the Standard Objects tree displays only the standard objects that you can customize.

5. Expand the object to which you want to add the field.
6. Select Pages, then select the Simplified Pages tab.
7. Under Creation Page Layouts or Detail Page Layouts, edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout.
8. Next to Field Groups, click the Add Group icon.
9. Specify a Name. This name displays on the simplified page with an icon to expand or collapse the group to show the associated fields.
10. Select Enable expand and collapse if you want the user to be able to expand and collapse the field group, and select Expand by default if you want it to appear expanded initially.
11. Click Next.
12. Move the fields that you want to add to the group from the Available Fields list to the Selected Fields list.
13. (Optional) Use the arrows to the right of the Selected Fields list to specify the order in which the fields appear in the group.

g. Click Save and Close, and then click Done.
14. Click Next.

*Note:* The Next button is available here only if additional layouts for the creation page or detail page already exist. If no additional layouts exist, the Save and Close button will be enabled and the final step is not available.

15. To add the same field group to another one or more layouts for the same page (creation page or detail page) click Select Additional Layouts at the top of the page and move the layouts you want to modify from the Available Layouts list to the Selected Layouts list.

16. Click Save and Close, and then click Done.

Try It

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. In any custom layout for the Support Ticket object’s simplified details page, create a field group named Additional that includes all available fields in a three-column grouping. Review the changes.
3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Adding an External Web Content Subtab to a Simplified Page

You can add a tab to a simplified detail page to display the content from a web page. For example, you might want a tab for a support ticket object that displays service request status information from a real-time status web page.

Adding an External Web Content Subtab to a Simplified Page

To add an external web content subtab to a simplified page:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application that contains the object you want to customize.
4. In the regional area, expand Standard Objects or expand Custom Objects, depending on which type of object you are working with.

   Note that the Standard Objects tree displays only the standard objects that you can customize.

5. Expand the object to which you want to add the tab.
6. Select Pages, then select the Simplified Pages tab.
7. Under Details Page Layouts, click Default custom layout.
8. Under the Subtabs Region area, click the Add icon .
9. Select the Web content option and click Next.
10. Enter a name for the subtab into the Display Label field.
11. In the text area at the bottom of the page, enter the URL to which you want to link, enclosed within double quotation marks. For example, “https://www.oracle.com” links to the Oracle home page.

12. Click Save and Close.

13. If the Web page does not display:
   - Ensure that you use a secure address, if it is available. That is, use an address that begins with https. For example, use https://www.example.com instead of http://www.example.com
   - If the page does not have a secure address, you must override the browser’s security settings to display this page. If you are sure it is safe to display the page, follow your browser’s procedures for displaying this content. For example, when using Mozilla Firefox, click the shield icon and disable protection for the page, as shown in the following figure.

   ✔ Note: If the owner of a page does not allow it to be displayed using the IFRAME HTML element, it will not load on the dashboard. Also, some browsers do not display unsecured Web pages in IFRAME HTML elements.

Try It

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.

2. Add a Web content subtab to the Support Ticket object’s simplified detail page. The subtab should display the contents of this URL: https://www.oracle.com. Review the changes.

3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Working with Mobile Pages

You can customize mobile pages in the following ways:

• Adding List, Create, and Detail Mobile Pages for a Custom Object
• Adding a Custom Field to a Mobile Page

Adding List, Create, and Detail Mobile Pages for a Custom Object

After you create a custom object, you must create pages to enable others to view, create, and edit information about that object. To do this, create a work area for each of the page types in which you want to display the object, such as simplified, mobile, or desktop pages.

The springboard or launch page is the first page displayed on a mobile device after you log in. The page shows icons for the functional areas of the application.

The list page is the first page that displays for a particular functional area or object on a mobile device. It lists the records associated with the object using from one to three fields for record. The user taps a record to drill down to the detail page for the record.
Creating Mobile Pages

To create mobile pages for an object:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application in which you want to create the object.
4. In the regional area, expand Custom Objects.
5. Expand the object for which you want to create the work area.
6. To display the Pages page, select Pages
7. Select the Mobile Pages tab, and then click Create Mobile Pages.
8. In the List View region, move a maximum of three fields that you want to appear in the list to the Selected Fields list, as shown in the following figure.

9. Use the arrows to the right of the list to specify the order in which the fields appear.
10. Select Show on Launch Page under Configure Detail Record Navigation Path to show the object on the launch.
11. Click Next.
12. In the Detail View region, move the fields that you want to appear in the detailed view to the **Selected Fields** list, as shown in the following figure.

![Create Mobile Pages: Select Fields](image)

13. Use the arrows to the right of the list to specify the order in which the fields appear.

14. In the Create or Edit View region, move a maximum of three fields that you want to appear in the view used to edit or create records to the **Selected Fields** list, as shown in the following figure.

![Create or Edit View](image)

15. Use the arrows to the right of the list to specify the order in which the fields appear.

16. Click **Next**.

17. Select any related objects you want to associate with the mobile pages. Icons for the related objects display at the bottom of the screen.

18. Click **Submit**.
Try It

Create mobile pages for the Support Ticket object, created in the Try It example for Creating a Custom Object, that meets the following specifications.

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
   o The icon for the object must appear in the mobile springboard. The icon must be labeled Support Ticket.
   o The list page must include the following fields:
     • Support Ticket Name
     • Created By
   o The detail page must include the following fields.
     • Support Ticket Name
     • Created By
     • Creation Date
     • Last Update Date
     • Last Update By
     • Currency Code
   o The creation and edit pages must include the following fields.
     • Support Ticket Name
     • Created By
     • Last Updated By

2. After you save your changes, log in to the mobile user interface, use the springboard to go to the new pages for this object, and then review the pages.

3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Adding a Custom Field to a Mobile Page

You can add custom fields to list pages, detail pages, and create and edit pages for objects with mobile pages. For example, you can add the Internal Comments field to the Support Ticket object’s creation and detail pages.

Adding a Custom Field to a Mobile Page

To add a custom field to a mobile page:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.

2. From the Tools group in the Navigator, select Application Composer.

3. In the regional area, select from the Application list the application that contains the object you want to customize.

4. In the regional area, expand Standard Objects or expand Custom Objects, depending on which type of object you are working with.
Note that the **Standard Objects** tree displays only the standard objects that you can customize.

5. Expand the object to which you want to add the field.

6. Select **Pages**, then select the **Mobile Pages** tab.

7. From the **Mobile Pages** tab, click the layout to use from the table under the associated page. You can edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout.

   **Note:** You cannot edit the standard layout. Instead, duplicate a standard layout to create custom layouts, which you can configure as needed, and then control its availability to users by assigning role, record type, or advanced expression conditions.

8. In the **Edit Layout View** region, move the fields that you want to appear on the page to the **Selected Fields** list.

9. Use the arrows to the right of the list to specify the order in which the fields appear.

10. Click **Save and Close**.

### Working with Desktop Pages

You can customize desktop pages in the following ways:

- Adding Summary, Create, and Detail Desktop Pages for a Custom Object
- Adding a Custom Field to a Desktop Page
- Adding an External Web Content Tab to a Desktop Page

### Adding Summary, Create, and Detail Desktop Pages for a Custom Object

After you create a custom object, you must create pages to enable others to view, create, and edit information about that object. To do this, create a work area for each of the page types in which you want to display the object, such as simplified, mobile, or desktop pages.

**Note:** Not every page type is available for every object.

Topics:

- Starting the Desktop Work Area Wizard
- Configuring the Navigator Menu and the Regional Search
- Configuring Local Search
- Configuring the Overview and Creation Pages
- Configuring the Details Page
- Setting or Changing Object Security
Starting the Desktop Work Area Wizard

Use the Create Work Area wizard to create a desktop page for an object.

To start the Create Work Area Wizard:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application in which you want to create the object.
4. In the regional area, expand Custom Objects.
5. Expand the object for which you want to create the work area.
6. To display the Pages page, select Pages.
7. Select the Desktop Pages tab, and then click Create Work Area.

Configuring the Navigator Menu and the Regional Search

Enable users to go to the object pages by adding a Navigator menu item. Optionally, add a regional search pane. This adds a search field to the regional area that searches the fields that you specify in the following steps.

To configure the Navigator menu and the regional search:

1. On the Configure Navigator Menu and Regional Search page, select the menu category in which you want the menu item for the page to appear, and enter the text for the menu item, as shown in the following figure.

2. The Menu Items list shows the position of the menu item within the category. Optionally, use the buttons on the right-hand side of the list to change the position.
3. To display a regional search pane in the regional area of the work area, select Enable, move the desired search fields to the Selected Fields list, and then use the arrows to the right of the list to specify the order in which the field appears. Otherwise, ensure that the check box is cleared.
4. If the regional search is enabled, specify the default operator for each field, such as **Starts with** or **Equals**, and then specify whether the field is required. Alternatively, you can choose a set of two or more fields where at least one field is required.

5. Click **Next**.

### Configuring Local Search

Specify which fields the end user can search on the local search area. If the object will have a large number of records for which the retrieval might take several minutes, consider requiring the end user to search on the fields that minimize the number of records to display.

To configure the local search:

1. On the Configure Search page, move the fields to appear in the local search to the **Selected Fields** list.
2. Use the arrows to the right of the list to specify the order in which the fields appear.
3. For each field, specify the default operator for each field, such as **Starts with** or **Equals**, and then specify whether the field is required. Alternatively, you can choose a set of two or more fields where at least one field is required.
4. Click **Next**.

### Configuring the Overview and Creation Pages

The overview page provides a high-level overview of the object. The page is composed of the following components:

- **Local search**: The local search determines which records appear in the summary table.
- **Summary table**: A table that enables the user to view a filtered list of the object's data. The end user can click an item in the drill-down column to view that record's details.

Configure which fields appear in the summary table on the overview page and which of the three actions an end user can perform from the page create, edit, and delete object records. If the create action is enabled, configure which fields appear in the creation page, which is the page from which users add records.

Note that you configured local search in an earlier task.

To configure the overview and creation pages:

1. From the **Drill Down Column** list, select the field that the end user can select to view the detail page. This should be a field that enables the end user to uniquely identify the record, such as the **Record Name** field.
2. In the **Configure Summary Table** region, move the fields that you want to appear in the summary table to the **Selected Fields** list.
3. Use the arrows to the right of the list to specify the order in which the fields appear.
4. Select the check boxes in the **Buttons and Actions** region to specify which actions the end user can perform on the records - create, edit, and remove.
5. In the **Configure Creation Page** region, move the fields that you want to appear in the creation page to the **Selected Fields** list. Note that required fields appear in the list by default.
6. Use the arrows to the right of the list to specify the order in which the fields appear.
7. Click **Next**.
Configuring the Details Page

The details page enables an end user to view and edit a record’s details. This page is composed of the following components:

- **Default summary**: The fields that appear on the page by default. Typically, this region contains the most commonly used fields.
- **Detailed summary**: These fields are hidden by default. The user must expand the region to see the fields.

You can include a given field in the default summary or the detailed summary, but not both.

Configure which fields appear in the details page.

To configure the details page:

1. In the **Configure Default Summary** region on the **Configure Details Page Summary** page, move the fields that you want to appear in the default summary to the **Selected Fields** list. The fields that you select will be displayed by default.
2. Use the arrows to the right of the list to specify the order in which the fields appear.
3. In the **Configure Detailed Summary** region, move the fields that you want to appear in the detailed summary region to the **Selected Fields** list. These fields are hidden from view until the end user expands the region.
4. Use the arrows to the right of the list to specify the order in which the fields appear.
5. Click **Save and Close**.

Try It

1. Create a page for the Support Ticket object, created in the Try It example for Creating a Custom Object, that meets the following specifications:
   - Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
   - The menu item for the page must appear in the **Sales** section of the Navigator. The menu item must be labeled **Support Ticket**
   - Do not enable a regional search for this page.
   - All available fields must be enabled for the local search. The operators must be the default operators.
   - The summary table must include the following fields:
     - Creation Date
     - Last Update Date
     - Last Updated By
   - The default summary region must include the following fields.
     - Support Ticket Name
     - Last Updated By
     - Last Updated Date
   - The **Created By** field must display on the detailed summary page.
   - After you create the pages, you must set security to specify the type of access different user roles have to the pages. For this challenge, make sure that the sales VP Duty role must have full privileges to create, view,
update, delete, view all, and update all for this object. All other roles must be able to view this object. For more information, see Set or Change Object Security.

2. After you save your changes, use the Navigator to go to the new pages for this object, and then review the pages.
3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

### Adding a Custom Field to a Desktop Page

You can add custom fields to summary tables, creation pages, and detail pages for standard and custom objects with desktop pages. For example, you can add the **Status** field to the summary table for the Support Ticket object.

### Adding a Custom Field to a Desktop Page

To add a custom field to a desktop work area:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the **Tools** group in the Navigator, select **Application Composer**.
3. In the regional area, select from the **Application** list the application that contains the object you want to customize.
4. In the regional area, expand **Standard Objects** or expand **Custom Objects**, depending on which type of object you are working with.

   Note that the **Standard Objects** tree displays only the standard objects that you can customize.
5. Expand the object to which you want to add the field.
6. To display the Pages page, select **Pages**.
7. Select the **Desktop Pages** tab.
8. To add the field to the summary table:
   - Click **Edit Summary Table**.
   - Move the fields that you want to add to the summary table from the **Available Fields** list to the **Selected Fields** list.
   - (Optional) Use the arrows to the right of the **Selected Fields** list to specify the order in which the fields appear in the summary table.
   - Click **Save and Close**.
9. To add the field to the creation page:
   - Click **Edit Creation Page**.
   - Move the fields that you want to add to the creation page from the **Available Fields** list to the **Selected Fields** list.
   - (Optional) Use the arrows to the right of the **Selected Fields** list to specify the order in which the fields appear on the creation page.
   - Click **Save and Close**.
10. To add the field to the detail page:
    - From the **Details Page** group, click an **Edit** link. The links available will differ depending on which object’s pages you want to edit.
    - If applicable, move the fields that you want to add to the default summary region from the **Available Fields** list to the **Selected Fields** list in the **Configure Default Summary** group.
Note: Fields that appear in the **Selected Fields** list in the **Configure Default Summary** group cannot appear in the **Selected Fields** list in the **Configure Detailed Summary** group and vice versa.

- If applicable, move the fields that you want to add to the detailed summary region from the **Available Fields** list to the **Selected Fields** list in the **Configure Detailed Summary** group.
- (Optional) Use the arrows to the right of the **Selected Fields** list to specify the order in which the fields appear in each region.
- Click **Save and Close**.

### Try It

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. In the Try It example for Adding Summary, Create, and Detail Desktop Pages for a Custom Object, you created a summary table on the Support Ticket object’s page. Add the **Assigned To** text field that was created in the Try It example for Adding a Text Field to this summary table. Review the changes.
3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

### Adding an External Web Content Tab to a Desktop Page

You can add a tab to a page to display the content from a web page. For example, in the Opportunities work area, you might want a tab that displays the content from a forum or an Oracle Social Network conversation.

### Adding a Web Content Subtab to a Desktop Page

To add a web content tab to a desktop page:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the **Tools** group in the **Navigator**, select **Application Composer**.
3. In the regional area, select from the **Application** list the application that contains the object you want to customize.
4. In the regional area, expand **Standard Objects** or expand **Custom Objects**, depending on which type of object you are working with.

   Note that the **Standard Objects** tree displays only the standard objects that you can customize.

5. Expand the object to which you want to add the tab.
6. To display the Pages page, select **Pages**.
7. From the **Actions** menu on the **Desktop Pages** tab, select **Create**.
8. Select the **Web content** option and click **Next**.
9. Enter a name for the subtab into the **Display Label** field.
10. In the text area at the bottom of the page, enter the URL to which you want to link, enclosed within double quotation marks. For example, “https://www.oracle.com” links to the Oracle home page.
11. Click **Save and Close**.
12. If the web page does not display:
   - Ensure that you use a secure address, if it is available. That is, use an address that begins with https. For example, use https://www.example.com instead of http://www.example.com.
   - If the page does not have a secure address, you must override your browser's security settings to display this page. If you are sure it is safe to display the page, follow your browser's procedures for displaying this content. For example, when using Mozilla Firefox, click the shield icon and disable protection for the page, as shown in the following figure.

   ✍️ Note: If the owner of a page does not allow it to be displayed using the IFRAME HTML element, it will not load on the dashboard. Also, some browsers do not display unsecured Web pages in IFRAME HTML elements.

Try It

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. Add a web content subtab to the Opportunities page. The subtab should display the contents of this URL: https://www.oracle.com. Review the changes.
3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Adding, Deleting, and Moving Columns in a Summary Table

The summary table in the overview pages might include columns that most users do not need to see, or there might be additional fields that users need to see for your type of business. You can add columns that you want to be displayed in a summary table. You can also delete columns that are not used by your company.

Perhaps you need to rearrange the columns, such as moving an Address column to the end of the table. You can move the columns in a summary table to better suit your workflow. Adding, deleting, and moving columns in a summary table affects all users, regardless of role.

✍️ Note: The procedure is the same for desktop and simplified pages.

Adding, Deleting, and Moving Columns in a Summary Table

To add, delete, or move columns in a summary table:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application that contains the object you want to customize.
4. In the regional area, expand Standard Objects or expand Custom Objects, depending on which type of object you are working with.
   - Note that the Standard Objects tree displays only the standard objects that you can customize.
5. Expand the object for which you want to move columns.
6. To display the Pages page, select **Pages**.
7. Select the **Desktop Pages** tab if you want to customize a desktop page, or select the **Simplified Pages** tab if you want to customize a simplified page.
8. For desktop pages, click **Edit Summary Table**. For simplified pages, click **Default custom layout** under **Landing Page Layouts**, then click the **Edit** icon next to **Summary Table**.
9. Move any columns that you want to add to the summary table from the **Available Fields** list to the **Selected Fields** list. Conversely, move any columns that you want to remove from the **Selected Fields** list to the **Available Fields** list.
10. (Optional) Use the arrows to the right of the **Selected Fields** list to specify the order in which the columns appear in the summary table.
11. Click **Save and Close**.

### Try It

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic **Isolating Your Work in Progress**.
2. Move the **Support Ticket Name** field to the end of the summary table in the Support Ticket page that you created in the Try It example for Adding Summary, Create, and Detail Desktop Pages for a Custom Object. Go to the Support Ticket page and review your changes.
3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

### Showing and Hiding Fields by Job Role on a Page

You can hide fields for users with a certain job role using Page Composer, as opposed to removing them through the process described in Adding, Deleting, and Moving Columns in a Summary Table.

> Note: Not all fields can be hidden.

### Showing or Hiding Fields

To show or hide fields on a desktop or simplified page:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic **Isolating Your Work in Progress**.
2. Go to the work area that you want to edit, such as the Opportunities work area.
3. To open Page Composer, from the **Administration** group in the **Settings and Actions** menu, select **Customize Pages**.
4. In the Customize page-name Pages dialog box, select **Job Role**, and then specify the job role for which you want the change to display.
5. Go to the page on which you want to show or hide a field. For example, if you’re editing the Opportunities work area, click an Opportunity to open its edit page.
6. Direct Selection allows you to edit screen components in place in the current layout. To enable Direct Selection mode in Page Composer, click the Select icon as shown in the following figure.

![Direct Selection Icon](image)

**Tip:** If the page that you are on has required fields, enter values into those fields before clicking Select.

7. To hide a field:
   - Hover over the field you want to hide. A box appears around the field and its label. Click inside of this box, then select Edit Component.

   **Note:** If the field is not customizable, Edit Component is disabled.
   - Clear the Show Component check box.
   - Click OK.

8. To show a field:
   - Hover over the parent component of field you want to show. A box appears around the parent component. Click inside of this box, then select Edit Parent Component.
   - Click the Children tab.
   - Select the check box next to the field you want to show.
   - Click OK.

9. Click OK.
10. To close Page Composer, click Close.

Try It

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.

2. Access the Support Ticket work area that you created in the Try It example for Adding Summary, Create, and Detail Desktop Pages for a Custom Object. Use Page Composer to customize the summary table for the Job Role that applies to your user account. Hide the Created By field. Save your changes, and then verify that the field is hidden. Then show the Created By field again and save the changes.

3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.
Changing a Specific Field Label: Explained

You might want to change a specific field label while retaining the original label on other fields with the same name. To change a specific field label in English only, use Application Composer. If your version of Oracle Sales Cloud supports multiple languages, then you'll also use the Customize User Interface Text Tool to change field labels.

Note: The procedure is the same for desktop and simplified pages. Not all fields are customizable.

Changing a Specific Field Label in English

To change a field label for an object localized for English:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. Navigate to Tools, Application Composer.
3. Select an application from the Application list.
4. Expand the object that contains the field you want to change, and click Fields.
5. If the object includes only one field with the name, change the field's Display Label, and go to step 11.
6. If the object includes more than one field with the same name (for example, Account), open each of the fields and change each display label to a unique value (for example, you might change one to Account123 and another to Account456).
7. Return to the object's UI. The unique names you've given the fields will help you identify which one you want to change. Make a note of its unique name.
8. Return to Application Composer, and expand Fields for the object.
9. Change the name of the field you identified by updating its Display Label field.
10. Change the unique names of any other fields you changed back to their original names.

Note: To assist future users in locating the specific details about each field, consider updating each field's Description with an identifying note.

11. Click Save and Close.
12. When you've finished making and verifying your changes, publish the sandbox.

Changing a Specific Field Label When Multiple Languages are Installed

To change a field label for an object localized for a language other than English:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. Navigate to Tools, Application Composer.

Important: Confirm that your current session locale is English. Application Composer is supported only in English, regardless of the language you're changing the field label to.

3. Select an application from the Application list.
4. Expand the object that contains the field you want to change, and click **Fields**.
5. If the object includes only one field with the name, change the field’s **Display Label**, and go to step 8.
6. If the object includes more than one field with the same name (for example, **Account**), open each of the fields and change each display label to a unique value (for example, you might change one to **Account123** and another to **Account456**).
7. Return to the object’s UI. The new names you’ve given the fields will help you identify which one you want to change. Make a note of its unique name.
8. Navigate to Tools, User Interface Text.

   **Note:** You must be signed in as a user with the Sales Administrator permission to use the Customize User Interface Text Tool.

9. Click the **Search and Replace** button.
10. In the **Language** drop-down list, select the language for which you want to change the field label (for example, Italian).
11. In the **Search For** box, enter the field’s display label, or the unique label you gave the field you want to change (for example, **Account123**) if your object included multiple fields with the same name.
12. In the **Replace** box, enter the label you want to change to, in the language you specified in step 10.
13. Select the following check boxes:
    - **Match Case**
    - **Match Complete Word or Phrase**
    - **User Interface Text**

   Deselect the other check boxes.
14. Click **Preview Changes**.

   You should get only one result, since you’re searching for a field with a unique name.
15. Click **Save and Close**.
16. Repeat steps 9-15 for each language you want to make changes for.
17. If your object included multiple fields with the same name, go back to the other fields you don’t want to update and change their **Display Labels** back to their original values.
18. When you’ve finished making your changes, publish the sandbox.

Try It

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic **Isolating Your Work in Progress**.
2. Use Application Composer to customize one of the **Account** field display labels on the Opportunity page. Identify an instance of the **Account** field you want to change, then change its **Display Label** to **Case**. View Opportunity page to ensure that your change appears as you expected, then change the other **Account** fields back to their original names.
3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.
Changing a Field Label on All Pages

You might want to change the field label on all of an object’s pages. Changing a field label using Application Composer changes that field’s labels on every page on which it appears. This affects every user and both desktop and simplified pages.

Changing a Field Label on All Pages

To change a field label on all pages that display that field:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application that contains the object you want to customize.
4. In the regional area, expand Standard Objects or expand Custom Objects, depending on which type of object you are working with.
   Note that the Standard Objects tree displays only the standard objects that you can customize.
5. Expand the object that contains the field label you want to change.
6. To display the Fields page, select Fields.
7. If you want to change the display name of a custom field, then select the Custom tab. If you want to change the display name of a standard field, then select the Standard tab.
8. Select the field you want to edit and click the Edit icon.
9. Enter the new label into the Display Label field.
10. Click Save and Close.

Try It

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. Change the name of the Assigned To field, added to the Support Ticket object in the Try It example for Adding a Text Field, to Assignee. Review the changes on the Support Ticket page.
3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Adding Link Text to a Page

You can add a link anywhere you can add a field. These links can be used to visit a commonly used website, or these links can be generated using the object record’s attributes. As an example, you may want to construct a link for each row of a summary table that searches the Internet for the name of a customer from an Opportunity record.

You must create a link item in Application Composer before you can add it to a page.

The following topics are covered in this section:

- Create a Link Item
• Add a Link to a Page

Creating a Link Item

To create a link item:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application that contains the object you want to customize.
4. In the regional area, expand Standard Objects or expand Custom Objects, depending on which type of object you’re working with.
   Note that the Standard Objects tree displays only the standard objects that you can customize.
5. Expand the object that contains the page to which you want to add a link.
6. To display the Actions and Links page, select Actions and Links.
7. From the Actions menu, click Create.
8. In the Create Action or Link page, enter the information for the link as follows:

   **Opportunity: Create Action or Link**

   ![Create Action or Link form]

   - **Display Label**: Enter the text for the link.
   - **Name**: Enter a unique internal name for the link.
   - **Link**: Select this option.

9. You can construct the URL for the link using one of the following methods:
   - In the text area at the bottom of the page, enter the URL to which you want to link, enclosed within double quotation marks. For example, "https://www.oracle.com" links to the Oracle home page.
   - In the text area at the bottom of the page, create a Groovy expression to construct a link using the object’s field values. The following example uses a field’s value to construct a search query URL:
     ```groovy
def myURL = SearchedField
def myfinalURL = "https://www.google.com/search?q=" + myURL
return(myfinalURL)
```
     In the example `SearchedField` is the internal name of the field you want to use to search. For example, the internal name of the Customer field for the Opportunity object is `TargetPartyName`.

   **Tip**: In the URL Definition region, select the Fields tab to find out which fields are available for the currently selected object. Select the field and click Insert to insert the field’s internal name at the current cursor position in the text area.
To check if the Groovy expression is valid, click the Validate icon. To see a message with the validation results, click anywhere in the text area.

See Application Composer: Using Groovy Scripts in Customizing Sales for more information.

10. Click Save.

Adding a Link to a Page

To add a link to a page:

1. Expand the object you are working with, and then select Pages.
2. If you want to add the link to a desktop page, then select the Desktop Pages tab. If you want to add the link to a simplified page, then click the Simplified Pages tab.
3. Edit the location of the object’s work area to which you want to add the link. For example, click Edit Summary Table to add the link to the object’s summary table.
4. Move the link from the Available Fields list to the Selected Fields list for the component to which you want to add it. The following figure shows a link being moved into the summary table for the Opportunities work area.

5. Click Save and Close.

Try It

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. Add a link to the summary table on the Opportunities work area. The link should be constructed to use the text of the current record’s Customer field to create the URL for a search engine query. Review the changes.
3. Note that the link will not appear in the summary table unless there are records displayed in the table. If there are no results, try different search parameters so that records appear in the summary table.
4. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.
Adding a Link Button to a Page

Topics:

- Create the Link Button
- Add the Link Button to a Page

You can add a link button to the toolbar above the summary table on a page. Clicking this button directs the user to an internal or external website that includes content relevant to the current work area. As an example, you might want to add a link button that goes to internal sales reference information. You can add a link button to a variety of locations:

- A summary table on the overview page
- A default summary on the details page
- A summary table on a detail page’s subtab
- A summary table on a tree node page for a child object
- A revenue table on the details page for the Opportunity object

Creating the Link Button

To create the link button:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Tools group in the Navigator, select Application Composer.
3. In the regional area, select from the Application list the application that contains the object you want to customize.
4. In the regional area, expand Standard Objects or expand Custom Objects, depending on which type of object you are working with.
   - Note that the Standard Objects tree displays only the standard objects that you can customize.
5. Expand the object that contains the page to which you want to add a link.
6. To display the Actions and Links page, select Actions and Links.
7. From the Actions menu, click Create.
8. In the Create Action or Link page, shown in the following figure, enter the information for the link button.

The following properties are required:

a. Display Label: Enter the text for the link.
b. **Name**: Enter a unique internal name for the link.

c. **Action**: Select this option.

d. **Source**: Select **URL**.

9. In the Script area at the bottom of the page, enter the URL to which you want to link, enclosed within double quotation marks. For example, "https://www.oracle.com" links to the Oracle home page.

   **Tip**: You can use Groovy expressions to dynamically create a URL from field values.

10. Click **Save**.

### Adding a Link Button to a Page

To add a link button to a page:

1. Expand the object you are working with, and then select **Pages**.
2. Edit the location of the object’s work area to which you want to add the link button. For example, click **Edit Summary Table** to add the button to the toolbar above an object’s summary table.
3. Move the link button from the **Available Buttons** list to the **Selected Buttons** list for the component to which you want to add it.

   The following figure shows a link button being moved into the summary table toolbar for the Support Tickets work area.

![Configure Detail Form: Buttons and Actions](image)

4. Click **Save and Close**. The following figure shows the button in the toolbar above the summary table on a simplified page.
Try It

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.

2. Add a link button to the toolbar above the summary table on the Support Tickets work area. The link button should go to this URL: https://www.oracle.com. Review the changes.

3. When you are done working in a sandbox, work with your applications administrator to ensure that the sandbox is deleted and is not published.

Working with Pages

See the following resources for more information about the concepts, tools, and procedures described in this chapter:

- Documentation about using Page Composer
  Customizing Pages in Extending the Applications
- Documentation about defining work area pages in Application Composer
  Defining Pages: Explained in Customizing Sales
Customizing Work Area Lists

Working with Searches

Many of the work area landing pads include predefined saved searches, also known as lists. Whenever users navigate to a work area, the application automatically runs the default saved search for that work area and displays the results. For example, the Accounts work area automatically runs the My Accounts saved search and displays a list of all of the accounts where the user is listed as the account owner. Sales administrators can customize the list of saved searches for all users or for specific job roles using the procedures in this chapter.

Creating Custom Work Area Lists

Watch: This tutorial shows how sales administrators can create custom work area lists (saved searches) for specific job roles or for the sales organization as a whole.

Customizing Work Area Lists Provided by Oracle: Procedures

Sales administrators can use the procedures in this topic to customize work area lists, also called saved searches. You can create lists to replace those supplied by Oracle and make your lists available to all users or target users with specific job roles.

Note: If you are creating lists for a specific job role, then you must first provision yourself with that job role so you can test the customization before publishing the sandbox. See the steps outlined in the related topic Assigning Yourself an Additional Job Role.

To customize work area lists, you do the following:

1. Navigate to the work area and get ready to customize by activating a sandbox and opening Page Composer.
2. Make your customizations. You can:
   - Create a custom search.
   - Hide searches provided by Oracle.
   - Delete any custom searches you created.
3. Publish the sandbox to make your customizations available to users.

Getting Ready to Customize Lists

Follow these steps to enable a sandbox and get ready to start customizing lists:

1. Navigate to the work area landing page you want to customize.
2. Click your user name at the top right corner of the page, select Manage Sandboxes, and activate an existing sandbox or create and activate a new one.
The application displays a bar across the top of the window indicating the sandbox is active.

3. From the same user name menu, select **Customize Pages**.

The Customize Pages window appears.

4. Select one of the two customization layers:
   - **Site** to make the customization available to everyone.
   - **Job Role** to target a specific job role you select from the list.

The Editing: User Interface Page Composer toolbar appears at the top of the page with the **Design** mode selected.

You are now ready to create the customized saved search. After you complete your customizations and test them, you must publish the sandbox to make your customizations available to your users.

### Creating a Custom Saved Search

With both the sandbox and the Editing: User Interface Page Composer toolbar displayed on the top of the page, follow these steps to create a custom saved search. You create a new saved search by editing an existing list and saving it under a new name.

1. In the work area landing pad, click **Show Advanced Search** (the filter icon) to the right of the **List** field.

   The Saved Searches window appears.

2. From the **Saved Search** list, select a saved search to use as the starting point for creating a new one.

   **Tip:** If you want to create a saved search using only one field, such as a custom field, then select one of two predefined saved searches: Name and Close Date. For opportunities and leads, select the **Close Date** saved search. For all other objects, select the name saved search, for example, the **Account Name** saved search or the **Contact Name** saved search.

3. Make your changes to the search criteria. You can:
   - Select a different record set to change the scope of your search. For example, selecting **My territory hierarchy** searches all the records in your territories and their subordinate territories. The available record sets vary from object to object.

     To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records in your territory hierarchy. Or restrict your searches to a smaller geographical area. For example, search all the accounts in one state instead of the whole country.

     - **Note:** If you are adding a custom field to your search, then the field must be indexed for best search performance.
   - Select different operators and values for the fields.
   - **Note:** You must enter values for fields marked with an asterisk.
   - Reorder the filter conditions by clicking **Reorder**.

   You cannot delete the fields provided by Oracle. You can only delete fields you added.
4. You can test your search by clicking **Search**.
5. If you are satisfied with the results, click **Save**.
   The Create Saved Search window appears.
6. Enter a new name for the saved search.
   You cannot reuse the names of the saved searches provided by Oracle with the application.
7. Make sure the **Run Automatically** option remains selected. Selecting this option runs the query each time you select the list in the UI.
8. If you want users to see the list generated by this search when they navigate to the work area, then select the **Set as Default** option.

   ✍ Note: Making a search the default does not override any default searches individual users may have created for their own use. Each user can personalize lists provided by administrators.
9. Click **OK** to return to the Saved Searches window

Hiding a Saved Search Provided by Oracle
Use the following procedure to hide a saved search supplied by Oracle from the list of searches available for selection in the work area. If you want to hide a saved search that is designated as the default search, then you must first designate a different list as the default.

   1. In the work area landing pad, click **Show Advanced Search** (the filter icon) to the right of the **List** field.
      The Saved Searches window appears.
   2. From the **Saved Search** list, select a saved search different from the one you want to hide.
   3. Now select **Personalize**.
      The Personalize Saved Searches window appears.
   4. Select the saved search you want to hide.
   5. Deselect the **Show in Search List** option.
   6. Click **OK**.
      A saved search supplied by Oracle remains available for future use but does not display in the in he work area. You can restore the saved search to the list in the future by selecting the **Show in Search List** option.

Deleting a Saved Search You Have Created
Use the following procedure to delete a saved search you have created.

   ✍ Note: If you delete a saved search that you specified as the default, then no list displays when users navigate to the work area.

   1. In the work area landing pad, click **Show Advanced Search** (the filter icon) to the right of the **List** field.
      The Saved Searches window appears.
   2. From the **Saved Search** list, select a saved search you want to delete.
   3. Now select **Personalize**.
      The Personalize Saved Searches window appears. The **Saves Searches** list displays the name of the saved search you are about to delete.
4. Click **Delete**.
5. Click **OK**.

**Related Topics**

- Setting Up Sandboxes: Procedure
- What gets saved when I create a saved search for searches with multiple criteria?

### Customizing Work Area Lists: Deleting

**Watch:** This tutorial shows how sales administrators can delete custom lists and hide lists provided by Oracle in the different Oracle Sales Cloud work areas.

### Enabling the Testing of Job Role-Specific Customizations

#### What's Required for Testing Customizations in the Sandbox

If you are creating customizations for a specific job role or if you are creating custom objects, then you must be provisioned with additional job roles to view and test those customizations in the sandbox. You can enable the testing of both types of customizations using the steps described in this section.

#### What's Required for Role-Specific Customizations

If you are creating customizations for a specific job role in either Application Composer or Page Composer, then you must assign yourself that same job role to be able to test the customizations in the sandbox. For example, if you are creating a custom page layout for the Sales Manager job role, then you must have the Sales Manager job role to view and test the layout. If you later create a different layout for salespersons, then you must deprovision the Sales Manager job role and provision yourself with the Sales Representative job role instead.

#### What's Required for Custom Objects

If you are creating custom objects, then you must assign yourself the Custom Objects Administration (ORA_CRM_EXTN_ROLE) role. The application automatically generates this custom object role the first time you create a custom object in the application. Unless users have this role, they cannot view or test custom objects they create.

### Setup Overview

1. While signed in as a user with security privileges, such as the setup user or the initial user you received when you signed up with Oracle Sales Cloud, you edit all of the role-provisioning rules for sales administrators and add the required job roles. Here is a summary of the steps:
   
   a. You search for and open the Manage HCM Role Provisioning Rules task in the Setup and Maintenance work area.
   
   b. You search for all role-provisioning rules containing the Sales Administrator job role.
   
   c. For each rule, you add the job roles required for testing. Selecting the **Self-requestable** option makes it possible for individual users to assign themselves each job role when needed.
d. If you are creating custom objects, then you must also add the Custom Objects Administration role. You must select both the Self-requestable and the Autoprovision option for this role. This object role is required for all custom objects, so you want to provision it automatically for future to sales administrators.

For details, see the Enabling Sales Administrators to Test Customizations in the Sandbox topic.

2. Sales administrators, who are resources with the Sales Administrator job role, navigate to the Resource Directory and assign themselves the job roles they need. Setup users, who are not resources, can edit their own user records in the Manage Users work area and assign themselves the roles there.

For details on how resources can assign themselves job roles in the Resource Directory, see the Assigning Yourself an Additional Job Role topic.

Enabling Sales Administrators to Test Customizations in the Sandbox

Modify the provisioning rules to make it possible for sales administrators to assign themselves the job roles they need for testing customizations in the sandbox. For viewing and testing custom objects, sales administrators must have the Custom Objects Administration (ORA_CRM_EXTN_ROLE) role. To test job role-specific customizations, they must have the same job role.

Modifying the Provisioning Rules for Sales Administrators

1. Sign in as a setup user or the initial user you received when you signed up with Oracle Sales Cloud.
2. Navigate to the Setup and Maintenance work area.
3. Search for the Manage HCM Role Provisioning Rules task.
4. Click the task name link in the search results.

The Manage Role Mappings page appears.

5. Search for the role mappings that provision the sales administrators:
   a. In the Search region, click the Role Name list and select the Search link.
   b. In the Search and Select window, enter Sales Administrator in the Role Name field and click Search.
   c. Select the role name and click OK.
   d. Click Search.
6. On the Manage Role Mapping page, click Search.

The Search Results display the mappings with the Sales Administrator job role.

7. Click the mapping name of each mapping and make the following edits:
   a. In the Associated Roles region, click Add Row (the plus sign icon) and add the job roles required for testing.
   b. For each job role, select the Requestable and the Self-requestable options and deselect Autoprovision. You do not want the job roles assigned to the sales administrators automatically.
   c. If you are creating custom objects, then you must also add the Custom Objects Administration role. The application automatically generates this custom object role the first time you create a custom object. For this job role select all of the options: Requestable, Self-requestable, and Autoprovision. All users creating custom objects must have this role when creating custom objects.
   d. Click Save and Close.
8. When you have added the job roles to all the provisioning rules, click Done.
Assigning Yourself Additional Job Roles Required for Testing

Sales administrators who are also sales resources can use this procedure to assign themselves the role they need to test role-specific customizations in the sandbox. For example, an administrator testing UI customizations for sales managers, requests the Sales Manager job role or the equivalent custom role. If you are creating custom objects, you can use this procedure to assign yourself the Custom Objects Administration role, if this role is not already assigned to you. The Custom Objects Administration role is required for testing custom objects in the sandbox.

**Note:** You can only assign yourself job roles that are made self-requestable in the role-provisioning rules created by a setup user. A setup user has the privileges to create other users and manage application security.

Assigning Yourself an Additional Job Role

2. Select **View Resource Details** from the **Actions** menu in your record.

The Resource page appears.

3. Select the Roles tab.
4. Click **Add Role**.

The Add Role window appears.

5. Search for the role you want to use for testing by name or partial name, select it, and click **OK**.

For testing custom objects, you must add the Custom Objects Administration role.
Note: Available roles include only those that were set up as self-requestable during provisioning rule setup.

The application returns you to the Resource page and displays the requested role in the Roles Requests region.

6. You can remove a role you no longer need for testing by selecting it and clicking Remove.

7. Click Save and Close.

The new role becomes available for your use in a few minutes, pending the completion of a background process. It displays in the Current Roles region the next time you navigate to this page.

How can I create saved searches with just one custom field?

You can create a saved search based on a custom field by customizing one of the two single-field saved searches provided by Oracle: Name and Close Date. For opportunities and leads, customize the Close Date list. For all other objects, including accounts, customize the Name list, for example, the Account Name list or the Contact Name list. Although you can only create a new search by editing an existing saved search and you cannot delete any of the existing fields, you can leave the value of some fields blank, effectively enabling you to search on the custom field. For optimal search performance, the custom fields used in search must be indexed for search.

For example, follow these steps to create a saved search for all accounts with a particular value of your custom field.

1. On the work area landing pad page such as Accounts, click Show Advanced Search (the filter icon).

   The Advanced Search panel appears on the left side of the page.

2. Select Account Name from the Saved Search list.

3. Click Add and select the custom field.

4. Enter a value in the custom field.

5. Click Save.

   The Create Saved Search window appears.

6. Enter a new name for your search.

7. If you want the new search to become the default, select the Set as Default option.

8. Make sure the Run Automatically option remains selected. Selecting this option runs the query each time you select the list in the UI.

9. Click OK
9 Changing the Look and Feel of Oracle Sales Cloud

Changing the Look and Feel of Oracle Sales Cloud: Overview

You can change the look and feel of Oracle Sales Cloud to meet your business needs or preferences. You can add your company logo, add content to the headers or footers of desktop pages, and change the appearance of simplified pages. This section describes the common tasks for changing the look and feel and includes the following topics.

- Simplified User Interface
- Desktop User Interface
- Learn More

Simplified User Interface

This section describes common tasks for changing the look and feel of the simplified user interface.

- Adding Your Company Logo to Simplified Pages
- Changing the Background Color for Simplified Pages
- Changing the Watermark for Simplified Pages

Adding Your Company Logo to Simplified Pages

Adding a company logo to a simplified page adds the logo to all simplified pages.

**Note:** Adding your company logo to simplified pages affects every simplified page. You cannot make this change for individual pages. This change may take up to 24 hours to take effect.

Adding a Company Logo to a Simplified Page

The customizations described in this section are applied directly to the mainline metadata and affect all users, regardless of whether a sandbox is active. Do not perform this task without coordinating with the other users of the test environment.

To add your company logo to simplified pages:

1. From the springboard, click **Tools**, and then open the **Appearance** tab.
2. Specify the type of logo (URL, File, or Predefined) that you want to use.
3. Enter the location of the logo that you want to use into the **Logo** field.

> **Note:** Ensure that users can access this image. For example, if the image is hosted on a local intranet it, will not be available to users accessing Oracle Sales Cloud from a location outside of the local network.

4. Click **Apply**.

**Try It**

Because the steps for changing a logo on simplified pages cannot be isolated in a sandbox, do not try the following steps unless you are working in a test environment and your changes do not adversely affect other users.

1. Copy the location of the current logo.
2. Change the logo of the simplified pages to the one found at this URL: [http://docs.oracle.com/cd/E38454_01/dcommon/gifs/oracle.gif](http://docs.oracle.com/cd/E38454_01/dcommon/gifs/oracle.gif).
3. Review the changes.
4. Paste the previous logo location into the **Logo URL** field and save the changes.

**Changing the Background Color for Simplified Pages**

You can change the background color for simplified pages by selecting a new color theme. Changing the theme of simplified pages changes the background color and sets the other fields to the default values for that theme.

It is recommended that you change the theme before configuring other field values on the **Appearance** tab, because changing the theme resets the other values on this tab, such as the **Watermark URL**.

Changing the background color of simplified pages affects every simplified page. You cannot make this change for individual pages. This change may take up to 24 hours to take effect.

**Changing the Background Color for Simplified Pages**

> **Caution:** The customizations described in this section are applied directly to the mainline metadata and affect all users, regardless of whether a sandbox is active. Do not perform this task without coordinating with the other users of the test environment.

To change the background color for simplified pages:

1. From the springboard, click **Settings**, and then open the **Appearance** tab.
2. Select one of the colors from the **Theme** list.
3. (Optional) To save the current settings as a new theme, expand the **Actions** menu and select **Save As**. Enter a name for the theme into the **Theme Name** field and click **Save and Close**. This also saves the current logo image, watermark image, and icon settings to the new theme.
4. Click **Apply**.
Changing the Watermark for Simplified Pages

You can change the watermark (background image) of simplified pages to something appropriate for your company. A watermark appears in the background of all simplified pages.

Changing the watermark for simplified pages affects every simplified page. You cannot make this change for individual pages. This change may take up to 24 hours to take effect.

Changing the Watermark for Simplified Pages

⚠️ Caution: The customizations described in this section are applied directly to the mainline metadata and affect all users, regardless of whether a sandbox is active. Do not perform this task without coordinating with the other users of the test environment. To change the watermark for simplified pages:

1. From the springboard, click Settings, and then open the Appearance tab.
2. Enter the location of the watermark that you want to use into the Background Image field.
3. Click Apply.

Desktop User Interface

This section describes common tasks for changing the look and feel of the desktop user interface and includes the following topics:

• Adding Your Company Logo to Desktop Pages
• Adding a Link to the Header and Footer for Desktop Pages

Adding Your Company Logo to Desktop Pages

Adding a company logo to a desktop page adds the logo to all desktop pages. You cannot make this change to individual pages. This change affects all users.

Adding a Company Logo to Desktop Pages

To add your company logo to desktop pages:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Administration group in the Settings and Actions menu, select Customize Global Page template.
3. From the View menu, select Source.
4. Select the logo and click the Edit icon.
5. In the Component Properties dialog box, click the Display Options tab.
6. In the Short Desc field, enter the text to be displayed when a user hovers over the logo.
7. Click the Style tab.
8. In the Background Image field, enter the URL for the logo.

**Note:** Ensure that users can access this image. For example, if the image is hosted on a local intranet, it will not be available to users accessing Oracle Sales Cloud from a location outside of the local network.

9. (Optional) Use the Other CSS field to provide the width and height of the logo, such as `background-size:119px 25px`.
10. Click OK, and then click Close.

### Try It

Copy the location of the current logo. Change the logo of the desktop pages to the one found at this URL: `http://www.oracleimg.com/us/assets/oralogo-small.gif`. Review the changes. Paste the previous logo location into the Logo URL field and save the changes.

**Note:** This challenge requires that you modify the user interface. Because your changes have the potential to affect other users, follow these guidelines:

1. Ensure that you are in an active sandbox.
2. When you finish the Try It examples in this document that require working in a sandbox, work with your applications administrator to ensure that the sandbox is destroyed and is not published.

### Adding a Link to the Header and Footer for Desktop Pages

You can add links to internal or external web pages to the header or footer of desktop pages.

The header is the area at the top of desktop pages, which contains your company logo and the global area.

The footer is the area at the bottom of desktop pages.

**Note:** Any changes to the header or footer of desktop pages affect every desktop page for every user. You cannot make changes to these areas for individual pages.

### Adding a Link to a Header or Footer

To add a link to the header or footer of desktop pages:

1. Ensure that you are working in a sandbox. For more information about working with sandboxes, see the topic Isolating Your Work in Progress.
2. From the Administration group in the Settings and Actions menu, select Customize Global Page template.
3. From the View menu, select Source.
4. To select a header component:
Select the `panelGroupLayout` component to which you want to add content, and then click **Add Content**, as shown in the following figure.
To select a footer component:

a. Select the left region of the footer area, as shown in the following figure.

b. In the source region, click `panelGroup:Layout: horizontal`, as shown in the following figure.

c. Click Add Content.

5. Select the Components folder.

6. Next to the Hyperlink component, click Add.

7. Select the newly added link text, and then click the Edit icon.
8. In the **Destination** field, enter the web page to which you want to link. For example, enter `https://www.oracle.com`.
9. (Optional) In the **Short Desc** field, enter hover text for the link.
10. (Optional) In the **Target Frame** field, enter `_blank`. This opens the web page in a new browser tab.
11. Next to the **Text** field, click the arrow, and then select **Expression Builder**.
12. In the **Type a value or expression text** area, enter the link text, and then click **OK** to close Expression Builder.
13. Click **OK**.
14. When you are finished editing the header or footer, click **Close**.

## Try It

1. In the desktop interface header, add a link to the right of the company logo. Make the link destination your company’s home page, such as `https://www.oracle.com`.
2. Save the changes, close Page Composer, and test the link.
3. Reopen Page Composer and remove the link from the header.

⚠️ **Note:** This challenge requires that you modify the user interface. Because your changes have the potential to affect other users, follow these guidelines:
- Ensure that you are in an active sandbox.
- When you finish the Try It examples in this document that require working in a sandbox, work with your applications administrator to ensure that the sandbox is destroyed and is not published.

## Related Topics

For more information about the Appearance page in the simplified user interface, see Changing the Look and Feel of Simplified Pages: Points to Consider in Customizing Sales.
Glossary

**customization layer**
A level that represents the scope of users that a customization impacts. For example, all users or only those who meet specific criteria.

**setup user**
A user provisioned with the job roles and abstract roles required to perform implementation tasks.