

# Oracle CX for Industries

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## **Implementing Consumer Goods**

**April 2023**



Oracle CX for Industries  
Implementing Consumer Goods

April 2023

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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

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# 1 About This Guide

## Audience and Scope

This guide is intended for administrators and implementors involved in setting up the Consumer Goods industry solution.

Perform the implementation steps covered in this guide either while implementing or after implementing Oracle CX Sales.

To set up and work with the additional features of Oracle CX Sales, see Oracle CX Sales documentation at <https://docs.oracle.com>.

## Related Guides

Refer to the related guides listed in the following table to understand more about the implementation tasks covered in this guide.

### Table

Title	Description
Oracle CX for Industries Using Consumer Goods Mobile	Describes how to perform tasks related to retail execution and trade promotions management using consumer goods mobile and tablet applications.
Oracle CX for Industries Integrating Retail Execution Mobile Direct-Store-Delivery	Provides information about how you can integrate back-end systems such as supply chain, accounting, or order management systems with Direct-Store-Delivery processes in Consumer Goods Mobile.
Oracle CX for Industries Using Consumer Goods	Describes the business flows and functionality in retail execution and trade promotion execution areas and how you can perform your day-to-day operations in these areas.
Oracle CX Sales Getting Started with Your Implementation	Describes how to set up a sales automation solution in Oracle CX Sales and Oracle B2B Service. This guide has a case study to describe concepts and procedures.
Oracle CX Sales Implementing Sales	Describes how to configure and set up Sales.
Understanding Import and Export Management for CX Sales and B2B Service	Describes how to import legacy and other data into Oracle CX Sales and Oracle B2B Service using Import and Export Management.
Oracle Applications Cloud Configuring Applications Using Application Composer	Describes the common tasks to make application changes, using tools such as Application Composer and Page Composer.



# 2 Implementation Overview

## Setup Tasks List

As implementation consultant or administrator, perform these setup tasks.

You can use this table as a checklist to understand the sequence of the tasks and where you perform them.

Setup Activity	Work Area and Task
Adding Roles to Users	Tools: Security Console
Creating Roles	Tools: Security Console <ul style="list-style-type: none"> <li>• Manage Duties</li> <li>• Manage Job Roles</li> </ul>
Enabling Access	Tools: Security Console
Creating Layouts	Application Composer
Configuring Workflows	Application Composer
Creating Triggers	Application Composer
Configuring Saved Searches	Page Composer
Registering Item Web Services	Application Composer
Activating Layouts	Application Composer
Configuring Security Setting	Application Composer
Running Processes	Scheduled Processes
Configuring Profile Options	Setup and Maintenance
Setting Up Data Security Policies	Security Console

You must perform the steps provided in this section in conjunction with, or after completing, the steps mentioned in Getting Started with Your Implementation guide of sales application.

For direct store delivery information, see the Integrating Retail Execution Mobile Direct Store Delivery guide.

You can understand how the integrated applications work with the consumer goods mobile with configurations steps that you must perform to support the integrated business processes.

### *Related Topics*

# 3 Standard Roles

## Duplicate Standard Roles for Users

You must duplicate standard roles for sales administrator, sales manager, sales representative, marketing manager, channel account manager, channel operations manager, partner administration, and partner sales manager.

**Note:** Before you duplicate roles, you must run the Import User and Role Application Security Data job from **Scheduled Processes** to synchronize users and roles in Security Console.

1. Sign in using administrator role.
2. Navigate to **Tools > Security Console > Roles** and search for the sales manager role.
3. Click **Copy Role > Copy Top and Inherited Roles**.
4. Click the **Summary and Impact Report** train stop.
5. Click **Submit and Close**, then OK to close the confirmation message.
6. Select the check box for Role Copy Status in Administration tab. Wait for Status to be Complete.

**Note:** Repeat steps for sales administrator, sales manager, marketing manager, sales representative roles, channel account manager, channel operations manager, partner administration, and partner sales manager.

## Set Up Data Security Policies

Configure the data security policies to control the data based on the user role and permissions. Set up the policies for the following role and data:

- Sales representative and sales manager
  - Policy for sales representative and sales manager to view approved promotions from the Promotion object.
  - Policy for sales representative and sales manager to view approved promotions from the Account object.
  - Policy for the sales representative and sales manager to access price book database resource.
- Sales representative
  - Policy for sales representative to access activity object.
  - Policy for sales representative to view activities assignee.
  - Policy for the sales representative to access the sales product object.
- Consumer goods cashier and sales administrator
  - Policy for the consumer goods cashier and sales administrator to access the route settlement report.
- Marketing manager

- Functional security policy for marketing manager custom to access business plan and objectives.
- Marketing manager and sales representative
  - Data security policy for marketing manager custom and sales representative custom to access business plan and objectives.

**Note:** For more information to duplicate standard roles, see the topic on Setting Up Standard Roles.

## Policies for the Sales Representative and Sales Manager to View Approved Promotions

As a sales representative or sales manager, you can view the approved promotions from the Account and the Promotion objects.

To create and set up the policies:

**Note:** Perform the following steps twice, once for the custom sales representative custom role and then for the custom sales manager role.

1. Sign in using the sales administrator role.
2. Navigate to **Security Console > Roles**.
3. Search for the custom duplicated sales representative role.
4. Click **Edit Role**.
5. Click the Data Security Policies train stop. Search the following for each of the policies and press Enter:

Policy	Search
To View Approved Promotions from the Promotion Object	<p>__ORACO__Promotion in the Data Resource column</p> <p><b>Read</b> in Privilege column</p>
To View Approved Promotions from the Account Object	<p>__ORACO__AccountPromotion in the Data Resource column</p> <p><b>Read</b> in Privilege column</p>

6. On the Data Security Policies page, select the following for each of the policies:

Policy	Select
To View Approved Promotions from the Promotion Object	<p>__ORACO__Promotion in the Data Resource column</p> <p><b>Read</b> in Privilege column.</p> <p><b>All Values</b> in Conditions column.</p>

Policy	Select
To View Approved Promotions from the Account Object	<p><code>__ORACO__AccountPromotion</code> in the Data Resource column</p> <p><b>Read</b> in Privilege column</p> <p><b>All Values</b> in Conditions column.</p>

7. From the drop-down list select **Edit Data Security Policy** and edit the following fields:

Policies	Fields and Values
To View Approved Promotions from the Promotion Object	<p>Database Resource: <code>__ORACO_Promotion</code></p> <p>Start Date: Current date</p> <p>Policy Description: <code>Grant MOO_VIEW__ORACO_PROMOTION_C_DATA_PRIV permission to application role &lt;name of role&gt; on __ORACO_Promotion_c</code></p> <p>Data Set: Select using instance set</p> <p>Condition: Approved Rule</p> <p>Action: Read</p>
To View Approved Promotions from the Account Object	<p>Database Resource: <code>__ORACO_AccountPromotion</code></p> <p>Start Date: Current date</p> <p>Policy Description: <code>Grant view permission to application role &lt;name of role&gt; on __ORACO_AccountPromotion_c</code></p> <p>Data Set: Select using instance set</p> <p>Condition: <code>ApprovedPromotionRule</code></p> <p>Action: Read</p>

8. Click **OK**.

## Policy for the Sales Representative and Sales Manager to Access Price Book Database

Set up a data security policy to provide access to the sales representatives and sales managers for the price book database.

To create and set up the policy:

**Note:** Perform the following steps twice, once for the custom sales representative role and then for the custom sales manager role.

1. Sign in using the sales administrator role.
2. Navigate to **Security Console > Roles**.
3. Search for the custom duplicated sales representative custom role.
4. Click **Edit Role**.
5. Click the Functional Security Policies train stop and click **Add Functional Security Policy**.
6. Search for the following value and select the search result:

Field	Value
Policy Name	QSC_MANAGE_PRICE_BOOK_PRIV

7. Click **Add Privilege to Role** and close the dialog box.
8. Click **Summary and Impact Report** and **Save and Close**.

## Policies for the Sales Representative

Set up the following access policies for the sales representative:

- To allow access to the activity object to make changes and updates.
- To allow access to an activity assignee so that the sales representative can view whom the activities are assigned to.
- To allow access to the sales representative to the sales products objects.

To create and set up the policies to allow access to the activity object and view the activity assignee:

1. Sign in using the sales administrator role.
2. Navigate to **Security Console > Roles**.
3. Search for the custom duplicated sales representative role.
4. Click **Edit Role**.
5. Click the Data Security Policies train stop. Click **Create Data Security Policy**.
6. Create a policy with the following values:

Policies	Fields and Values
To allow access to the activity object to make changes and updates.	Policy Name: Grant on Activity  Database Resource: Activity  Start Date: Current date  Data Set: All values  Actions: Select all



Policies	Fields and Values
To allow access to an activity assignee so that the sales representative can view whom the activities are assigned to.	Policy Name: Grant on Activity resource  Database Resource: Activity Resource  Start Date: Current date  Data Set: All values  Actions: Select all

7. Click **OK**.

To grant access to the sales representative to access the sales product object:

8. Click the Functional Security Policies train stop and click **Add Functional Security Policy**.
9. Search for the following value and select the search result:

Field	Value
Policy Name	QSC_MANAGE_PRODUCTS_PRIV

10. Click **Add Privilege to Role** and close the dialog box.
11. Click **Summary and Impact Report** and **Save and Close**.

## Policy for the Cashiers and Sales Administrators to View Route Settlement Report

Create the data security policies for the following objects to provide the consumer goods cashier role access to the route settlement report:

- `__ORACO__RoutePresettlement_c`
- `__ORACO__CouponTransaction_c`
- `__ORACO__Expense_c`
- `__ORACO__Document_c`

To create data security policy for the consumer goods cashier:

1. Sign in using the administrator role.

**Note:** You must have the IT security manager job role to complete the task.

2. Navigate to the Administration sub tab of the Security Console and click **Manage Database Resources**.
3. Search for one of the following objects on the Manage Database Resources and Policies page:
  - `__ORACO__RoutePresettlement_c`
  - `__ORACO__CouponTransaction_c`

- `__ORACO__Expense_c`
  - `__ORACO__Document_c`
4. Select the object from the search result and click **Edit**.
  5. Navigate to the Condition tab and click **Create**.
  6. Depending on the object for which you're creating the data security policy, provide the following information in the Create Database Resource Condition dialog box.

Object Name	Fields and Values
<code>__ORACO__RoutePresettlement_c</code>	<p>Name: <code>ACO_ROUTE_SETTLEMENT_OPEN</code></p> <p>Display Name: Access route settlement report if the status is open.</p> <p>Condition Type: SQL predicate</p> <p>SQL predicate: <code>&amp;TABLE_ALIAS.EXTN_ATTRIBUTE_CHAR009 = 'ORA_ACO_SETTLEMENT_OPEN'</code></p>
<code>__ORACO__CouponTransaction_c</code>	<p>Name: <code>ACO_COUPON_TRANS_PARENT_OPEN</code></p> <p>Display Name: Access coupon settlement if the status of the parent route settlement report is open.</p> <p>Condition Type: SQL predicate</p> <p>SQL predicate: <code>exists (select 1 from HZ_REF_ENTITIES rps where rps.attribute_category = '__ORACO__RoutePresettlement_c' and rps.ID= &amp;TABLE_ALIAS.EXTN_ATTRIBUTE_NUMBER002 and rps.EXTN_ATTRIBUTE_CHAR009 = 'ORA_ACO_SETTLEMENT_OPEN')</code></p>
<code>__ORACO__Expense_c</code>	<p>Name: <code>ACO_EXPENSE_PARENT_OPEN</code></p> <p>Display Name: Access expense if the status of the parent route settlement report is open.</p> <p>Condition Type: SQL predicate</p> <p>SQL predicate: <code>exists (select 1 from HZ_REF_ENTITIES rps where rps.attribute_category = '__ORACO__RoutePresettlement_c' and rps.ID= &amp;TABLE_ALIAS.EXTN_ATTRIBUTE_NUMBER001 and rps.EXTN_ATTRIBUTE_CHAR009 = 'ORA_ACO_SETTLEMENT_OPEN')</code></p>
<code>__ORACO__Document_c</code>	<p>Name: <code>ACO_DOCUMENT_PARENT_OPEN</code></p> <p>Display Name: Access document if the status of the parent route settlement report is open.</p> <p>Condition Type: SQL predicate</p>

Object Name	Fields and Values
	SQL predicate: <code>exists (select 1 from HZ_REF_ENTITIES rps where rps.attribute_category = '__ORACO__RoutePresettlement_c' and rps.ID= &amp;TABLE_ALIAS.EXTN_ATTRIBUTE_NUMBER001 and rps.EXTN_ATTRIBUTE_CHAR009 = 'ORA_ACO_SETTLEMENT_OPEN')</code>

7. Click **Save**
8. Navigate to the Policy tab and click **Create**.
9. Provide the following information in the Create Policy dialog box:
  - a. On the General Information tab:

Object Name	Fields	Values
<code>__ORACO__RoutePresettlement_c</code>	Name Start Date	Grant on Route Settlement Report  Select a start date according to the requirements of your organization.
<code>__ORACO__CouponTransaction_c</code>	Name Start Date	Grant on Coupon Settlement  Select a start date according to the requirements of your organization.
<code>__ORACO__Expense_c</code>	Name Start Date	Grant on Expense  Select a start date according to the requirements of your organization.
<code>__ORACO__Document_c</code>	Name Start Date	Grant on Document  Select a start date according to the requirements of your organization.

- b. On the Role tab:
  - i. Click **Add** and search for the role for which you're creating the data security policies using the following information for each of the objects:

Role Name	Search Field
Consumer goods cashier	Role Name: <code>ACO_CG_CASHIER_CUSTOM</code>  Application: CRM

Role Name	Search Field
Sales administrator custom	Role Name: <b>ZBS_SALES_ADMINISTRATOR_JOB_CUSTOM</b>  Application: CRM

- ii. Select consumer goods cashier and the sales administrator custom roles from the search result and click **OK**.
- iii. On the Rule tab:

Object Name	Fields	Values
<b>__ORACO__RoutePresettlement_c</b>	Row Set  Condition	Multiple Values  Access route settlement report if the status is open.
<b>__ORACO__CouponTransaction_c</b>	Row Set  Condition	Multiple Values  Access coupon settlement if the status of the parent route settlement report is open.
<b>__ORACO__Expense_c</b>	Row Set  Condition	Multiple Values  Access expense if the status of the parent route settlement report is open.
<b>__ORACO__Document_c</b>	Row Set  Condition	Multiple Values  Access document if the status of the parent route settlement report is open.

- iv. Navigate to the Action tab and move the **update** to the Selected Actions area for all the objects.
- v. Click **Save and Close**.

**10. Click Submit.**

Data security policies are created for the consumer goods cashier role and sales administrator to access the route settlement report.

## Policy for Partner Administrator and Partner Sales Manager

You can give access to the partner administrator and partner sales manager to the claim and deduction database resource.

To set up the policy:

1. Sign in using the administrator role.
2. Navigate to **Security Console > Administration**.
3. Navigate to the Administration subtab and click **Manage Database Resources**.
4. Search for `__ORACO__ClaimRequest_c` Or `__ORACO__DeductionRequest_c` in the object name search field.
5. Click **Edit** for the search results from step four.
6. Navigate to the Conditions subtab and click **Create** and enter the following details:

Provide the following information in the Create Database Resource Condition dialog and click **Save**.

Object Name	Fields and Values
<code>__ORACO__ClaimRequest_c</code>	<p>Name: <code>ACO_CLAIM_REQUEST_FOR_PARTNER</code></p> <p>Display Name: <code>Access claim requests of partner organization</code></p> <p>Condition Type: <code>SQL Predicate</code></p> <p>SQL Predicate: <code>&amp;TABLE_ALIAS.EXTN_ATTRIBUTE_NUMBER001 = HZ_SESSION_UTIL.GET_USER_PARTNER_COMPANYID</code></p>
<code>__ORACO__DeductionRequest_c</code>	<p>Name: <code>ACO_DEDUCTION_REQUEST_FOR_PARTNER</code></p> <p>Display Name: <code>Access deduction requests of partner organization</code></p> <p>Condition Type: <code>SQL Predicate</code></p> <p>SQL Predicate: <code>&amp;TABLE_ALIAS.EXTN_ATTRIBUTE_NUMBER001 = HZ_SESSION_UTIL.GET_USER_PARTNER_COMPANYID</code></p>

7. Navigate to the Policy tab and click **Create**.
8. Provide the following information in the Create Policy Dialog box:
  - a. In the General Information tab:

Object Name	Field	Value
<code>__ORACO__ClaimRequest_c</code>	Name	Grant on Claim Request
	Start Date	Select a start date according to business requirement
<code>__ORACO__DeductionRequest_c</code>	Name	Grant on Deduction Request
	Start Date	Select a start date according to business requirement

b. In the Role tab enter the following:

Object Name	Application	Role
__ORACO__ClaimRequest_c	CRM	Partner Sales Administrator Custom, Partner Sales Manager Custom
__ORACO__DeductionRequest_c	CRM	Partner Sales Administrator Custom, Partner Sales Manager Custom

c. Select the roles in the table from the search results and click **OK**.

d. In the Rule tab:

Object Name	Application	Role
__ORACO__ClaimRequest_c	Row Set	Multiple Values
	Condition	Access claim requests of partner organization
__ORACO__DeductionRequest_c	Row Set	Multiple Values
	Condition	Access deduction requests of partner organization

e. Navigate to the Action tab and move Read, Update, and Delete to the Selected Actions area for \_\_ORACO\_\_ClaimRequest\_c and Read for \_\_ORACO\_\_DeductionRequest\_c.

f. Click **Save and Close**.

9. Click **Submit**.

## Functional Security Policy for Marketing Manager Custom to Access Business Plan and Objectives

Here's how you can set up the policy:

1. Sign in using the sales administrator role.
2. Navigate to **Security Console > Roles**.
3. Search for custom duplicated marketing manager custom role.
4. Click **Edit Role**.

5. Click **Functional Security Policies** and click **Add below Functional Security Policy**.

Add the following security policies:

Role Name	Name	Description	Comments
Marketing Manager Custom	Create Sales Business Plan	Allows you to create sales business plans.	
Marketing Manager Custom	Delete Sales Business Plan	Allows you to delete sales business plans.	
Marketing Manager Custom	Update Sales Business Plan	Allows you to update sales business plans.	
Marketing Manager Custom	View Sales Business Plan	Allows you to view sales business plans.	
Marketing Manager Custom	Configure Sales Business Plan UI	Allows you to configure business plan UI.	
Marketing Manager Custom	Create Sales Objective	Allows you to create sales objectives.	
Marketing Manager Custom	Delete Sales Objective	Allows you to delete sales objectives.	
Marketing Manager Custom	Update Sales Objective	Allows you to update sales objectives.	
Marketing Manager Custom	View Sales Objective	Allows you to view sales objectives.	
Marketing Manager Custom	Configure Sales Objective UI	Allows you to configure sales objective UI.	
Marketing Manager Custom	Manage Sales Objective Setup	Allows you to manage the set of objective types.	

Here's how you can remove security policies:

1. Sign in using the sales administrator role.

2. Navigate to **Security Console > Roles**.
3. Search for custom roles listed in the following table.
4. Click **Edit Role**.
5. Click **Functional Security Policies** and remove the following security policies.

Role Name	Name	Description	Comments
Sales Representative Custom	Create Sales Business Plan	Allows you to create sales business plans.	
Sales Representative Custom	Delete Sales Business Plan	Allows you to delete sales business plans.	
Sales Representative Custom	Update Sales Business Plan	Allows you to update sales business plans.	
Account Manager Custom	View Sales Business Plan	Allows you to view sales business plans.	
Account Manager Custom	Create Sales Business Plan	Allows you to create sales business plans.	
Account Manager Custom	Delete Sales Business Plan	Allows you to delete sales business plans.	
Account Manager Custom	Update Sales Business Plan	Allows you to update sales business plans.	
Sales Manager Custom CG	View Sales Business Plan	Allows you to view sales business plans.	
Sales Manager Custom CG	Create Sales Business Plan	Allows you to create sales business plans.	
Sales Manager Custom CG	Delete Sales Business Plan	Allows you to delete sales business plans.	
Sales Manager Custom CG	Update Sales Business Plan	Allows you to update sales business plans.	
Channel Account Manager Custom	View Sales Business Plan	Allows you to view sales business plans.	



Role Name	Name	Description	Comments
Channel Account Manager Custom	Create Sales Business Plan	Allows you to create sales business plans.	
Channel Account Manager Custom	Delete Sales Business Plan	Allows you to delete sales business plans.	
Channel Account Manager Custom	Update Sales Business Plan	Allows you to update sales business plans.	
Channel Operations Manager Custom	View Sales Business Plan	Allows you to view sales business plans.	
Channel Operations Manager Custom	Create Sales Business Plan	Allows you to create sales business plans.	
Channel Operations Manager Custom	Delete Sales Business Plan	Allows you to delete sales business plans.	
Channel Operations Manager Custom	Update Sales Business Plan	Allows you to update sales business plans.	
Channel Operations Manager Custom	Configure Sales Business Plan UI	Allows you to configure sales business plan UI.	
Channel Operations Manager Custom	Configure Sales Objective UI	Allows you to configure sales objective UI.	
Channel Operations Manager Custom	Manage Sales Objective Setup	Allows you to manage the set of objective types.	
Partner Sales Manager Custom	View Sales Business Plan	Allows you to view sales business plans.	
Partner Sales Manager Custom	Update Sales Business Plan	Allows you to update sales business plans.	
Partner Sales Manager Custom	Update Sales Objective	Allows you to update sales objectives.	

Role Name	Name	Description	Comments
Partner Sales Manager Custom	View Sales Objective	Allows you to view sales objectives.	
Partner Administrator Custom	View Sales Business Plan	Allows you to view sales business plans.	
Partner Administrator Custom	Update Sales Business Plan	Allows you to update sales business plans.	
Partner Administrator Custom	Update Sales Objective	Allows you to update sales objectives.	
Partner Administrator Custom	View Sales Objective	Allows you to view sales objectives.	

### Data Security Policy for Marketing Manager Custom and Sales Representative Custom to Access Business Plan and Objectives

Here's how you can add security policies:

1. Sign in using the sales administrator role.
2. Navigate to **Security Console > Roles**.
3. Search for each role listed in the following table and perform these steps separately for each role.
4. Click **Edit Role**.
5. Click **Data Security Policies** and click **Add**.
6. Add the following data security policies:

Role	Policy Name	Database Resource	Description	Data Set	Condition Name	Actions	Comments
Sales Representative Custom role	Grant on Sales Business Plan	Sales Business Plan		All values		View Sales Business Plan Read	
Marketing Manager Custom role	Grant on Sales Business Plan	Sales Business Plan		All values		Read Update Delete	

Role	Policy Name	Database Resource	Description	Data Set	Condition Name	Actions	Comments
						View Sales Business Plan  Update Sales Business Plan General  Update Sales Business Plan Status  Delete Sales Business Plan	
Marketing Manager Custom role	Grant on Sales Business Plan Team	Sales Business Plan Team		All values		Read  Update  Delete  View Sales Business Plan  Update Sales Business Plan General  Update Sales Business Plan Status  Delete Sales Business Plan  Manage Sales Business Plan Team	
Marketing Manager Custom role	Grant on Sales Business Plan Note	Note		Select by instance set	Access the deal registration note for table <b>ZMM_NOTES</b> where they are the author of the note or notes that are not	Read  Update  Delete  Manage Sales Business Plan Note	

Role	Policy Name	Database Resource	Description	Data Set	Condition Name	Actions	Comments
					private created by their organization or external notes created by the deploying company or external notes created by partner where they belong to the deploying company		
Marketing Manager Custom role	Grant on Sales Business Plan File Import	File Import Activity		Select by instance set	Access the sales business plan file import for table <b>MKT_IMP_JOBS</b> all business plan file import objects	Read View Sales Business Plan File Import	
Marketing Manager Custom role	Grant on Sales Business Plan Team File Import	File Import Activity		Select by instance set	Access the sales business plan team file import for table <b>MKT_IMP_JOBS</b> all business plan team file import objects	Read View Sales Business Plan Team File Import	
Marketing Manager Custom role	Grant on Sales Business Plan File Import Mapping	File Import Mapping		Select by instance set	Access the sales business plan file import mapping for table <b>MKT_IMP_MAP</b> all business plan file import mapping objects	Read View Sales Business Plan File Import Mapping	

Role	Policy Name	Database Resource	Description	Data Set	Condition Name	Actions	Comments
Marketing Manager Custom role	Grant on Sales Business Plan Team File Import Mapping	File Import Mapping		Select by instance set	Access the sales business plan team file import mapping for table <b>MKT_IMP_MAP</b> all business plan team file import mapping objects	Read  View Sales Business Plan Team File Import Mapping	
Marketing Manager Custom role	Grant on Sales Business Plan Team File Import Metadata	File Import Object		Select by instance set	Access the sales business plan team file import metadata for table <b>MKT_IMP_OBJECTS</b> all business plan team file import metadata objects	Read  View Sales Business Plan Team File Import Metadata	
Marketing Manager Custom role	Grant on Sales Business Plan File Import Metadata	File Import Object		Select by instance set	Access the sales business plan file import metadata for table <b>MKT_IMP_OBJECTS</b> all business plan file import metadata objects	Read  View Sales Business Plan File Import Metadata	
Marketing Manager Custom role	Grant on Sales Business Plan Export Object	File Export Object		Select by instance set	Access the sales business plan export object for table <b>ZCA_EXP_OBJECTS</b> all business plan export objects	Read  View Sales Business Plan Export Object	

Role	Policy Name	Database Resource	Description	Data Set	Condition Name	Actions	Comments
Marketing Manager Custom role	Grant on Sales Business Plan Team Export Object	File Export Object		Select by instance set	Access the sales business plan team export object for table <b>ZCA_EXP_OBJECTS</b> all business plan team export objects	Read  View Sales Business Plan Team Export Object	
Marketing Manager Custom role	Grant on Sales Objective	Sales Objective		All values		Read  Update  Delete  View Sales Objective  Update Sales Objective General  Update Sales Objective Attainment  Delete Sales Objective	
Marketing Manager Custom role	Grant on Sales Objective Dimension	Sales Objective Dimension		All values		Read  Update  Delete  View Sales Objective  Update Sales Objective General  Update Sales Objective Attainment	

Role	Policy Name	Database Resource	Description	Data Set	Condition Name	Actions	Comments
						Delete Sales Objective	
Marketing Manager Custom role	Grant on Sales Objective Target	Sales Objective Target		All values		Read Update Delete View Sales Objective Update Sales Objective General Update Sales Objective Attainment Delete Sales Objective	
Marketing Manager Custom role	Grant on Sales Objective Type	Sales Objective Type		All values		Read Update Delete View Sales Objective Update Sales Objective General Update Sales Objective Attainment Delete Sales Objective	
Marketing Manager Custom role	Grant on Sales Objective Note	Note		Select by instance set	Access the deal registration note for table <b>ZMM_NOTES</b>	Read Update	

Role	Policy Name	Database Resource	Description	Data Set	Condition Name	Actions	Comments
					where they are the author of the note or notes that are not private created by their organization or external notes created by the deploying company or external notes created by partner where they belong to the deploying company	Delete  Manage Sales Objective Note	
Marketing Manager Custom role	Grant on Sales Objective Target File Import	File Import Activity		Select by instance set	Access the sales objective target file import for table <b>MKT_IMP_JOBS</b> all objective target file import objects	Read  View Sales Objective Target File Import	
Marketing Manager Custom role	Grant on Sales Objective Dimension File Import	File Import Activity		Select by instance set	Access the sales objective dimension file import for table <b>MKT_IMP_JOBS</b> all objective dimension file import objects	Read  View Sales Objective Dimension File Import	
Marketing Manager Custom role	Grant on Sales Objective File Import	File Import Activity		Select by instance set	Access the sales objective file import for table <b>MKT_IMP_JOBS</b> all objective file import objects	Read  View Sales Objective File Import	



Role	Policy Name	Database Resource	Description	Data Set	Condition Name	Actions	Comments
Marketing Manager Custom role	Grant on Sales Objective File Import Mapping	File Import Mapping		Select by instance set	Access the sales objective file import mapping for table <b>MKT_IMP_MAP</b> all objective file import mapping objects	Read View Sales Objective File Import Mapping	
Marketing Manager Custom role	Grant on Sales Objective Target File Import Mapping	File Import Mapping		Select by instance set	Access the sales objective target file import mapping for table <b>MKT_IMP_MAP</b> all objective target file import mapping objects	Read View Sales Objective Target File Import Mapping	
Marketing Manager Custom role	Grant on Sales Objective Dimension File Import Mapping	File Import Mapping		Select by instance set	Access the sales objective dimension file import mapping for table <b>MKT_IMP_MAP</b> all objective dimension file import mapping objects	Read View Sales Objective Dimension File Import Mapping	
Marketing Manager Custom role	Grant on Sales Objective Target File Import Metadata	File Import Object		Select by instance set	Access the sales objective target file import metadata for table <b>MKT_IMP_OBJECTS</b> all objective	Read View Sales Objective Target File Import Metadata	

Role	Policy Name	Database Resource	Description	Data Set	Condition Name	Actions	Comments
					target file import metadata objects		
Marketing Manager Custom role	Grant on Sales Objective File Import Metadata	File Import Object		Select by instance set	Access the sales objective file import metadata for table <b>MKT_IMP_OBJECTS</b> all objective file import metadata objects	Read View Sales Objective File Import Metadata	
Marketing Manager Custom role	Grant on Sales Objective Dimension File Import Metadata	File Import Object		Select by instance set	Access the sales objective dimension file import metadata for table <b>MKT_IMP_OBJECTS</b> all objective dimension file import metadata objects	Read View Sales Objective Dimension File Import Metadata	
Marketing Manager Custom role	Grant on Sales Objective Export Object	File Export Object		Select by instance set	Access the sales objective export object for table <b>ZCA_EXP_OBJECTS</b> all objective export objects	Read View Sales Objective Export Object	
Marketing Manager Custom role	Grant on Sales Objective Target Export Object	File Export Object		Select by instance set	Access the sales objective target export object for table <b>ZCA_EXP_OBJECTS</b> all objective target export objects	Read View Sales Objective Target Export Object	

Role	Policy Name	Database Resource	Description	Data Set	Condition Name	Actions	Comments
Marketing Manager Custom role	Grant on Sales Objective Dimension Export Object	File Export Object		Select by instance set	Access the sales objective dimension export object for table <b>ZCA_EXP_OBJECTS</b> all objective dimension export objects	Read  View Sales Objective Dimension Export Object	

## Configure Lookups

Lookups are lists of values in applications. You define a list of values as a lookup type consisting of a set of lookup codes, each code's translated meaning, and optionally a tag. You can see the list of translated meanings as the available values for an object.

Lookups provide you a means of validation and lists of values where valid values appear on a list with no duplicate values. For example, an application stores the values Y and N in a table column, but can display values, Yes or No (or translated equivalents). For example, the two lookup codes Y and N are defined in the `REQUIRED_INDICATOR` lookup type.

Some lookups are used by code in the application. Obsoleting values in these lookups could impact the functioning of the associated capabilities. Consult your implementation team before making changes to the following lookup.

Lookup Type: `ORA_ACO_ORDER_STATUS`

**Note:** Ensure that all the lookup values are enabled. Disabling lookup values will result in errors during the shipment delivery.

Lookup Code	Meaning
<code>ORA_ACO_ORDER_STATUS_BOOKED</code>	Booked
<code>ORA_ACO_ORDER_STATUS_BOOKREJ</code>	Booking rejected
<code>ORA_ACO_ORDER_STATUS_CANCELED</code>	Canceled
<code>ORA_ACO_ORDER_STATUS_CANCELREJ</code>	Cancellation rejected
<code>ORA_ACO_ORDER_STATUS_CANCELREQ</code>	Cancellation requested
<code>ORA_ACO_ORDER_STATUS_DELIVERED</code>	Delivered

Lookup Code	Meaning
ORA_ACO_ORDER_STATUS_ERROR	Error
ORA_ACO_ORDER_STATUS_ONHOLD	Overdue
ORA_ACO_ORDER_STATUS_OPEN	Open
ORA_ACO_ORDER_STATUS_PARTIAL	Partially delivered
ORA_ACO_ORDER_STATUS_SUBMITTED	Submitted
ORA_ACO_ORDER_STATUS_UPDATED	Updated
ORA_ACO_ORDER_STATUS_UPDATEREJ	Update rejected
ORA_ACO_ORDER_STATUS_UPDATEREQ	Update requested

### Configure Lookups for Business Plan and Objectives

Depending on the configuration level of a lookup type, change the codes or their meanings. Some lookups are designated as extensible, so new lookup codes can be created during the implementation, but the predefined lookup codes can't be modified. Some predefined lookup codes can be changed during implementation or later, as needed.

1. Sign in using the administrator role.
2. Navigate to **Setup and Maintenance**.
3. Search for and select **Manage Standard Lookups**.
4. Click **Create** on the `ORA_ZCA_BUS_PLAN_CLASS` lookup codes region and provide the following information

Field Name	Value
Lookup Code	Default
Display Sequence	1 <ul style="list-style-type: none"> <li>○ Edit the display sequence of <b>ACCOUNT</b> as 2</li> <li>○ Edit the display sequence of <b>PARTNER</b> as 3</li> </ul>
Enabled	Y
Meaning	Default

### Replace Strings for Business Plan and Objectives

Before you search and replace the strings and fields, complete the following prerequisite tasks:

1. Sign in using the administrator role, create and activate a sandbox.
2. Go to Application Composer, expand Custom Objects, and edit the **Business Plan** object.
  - o Replace the display label **Business Plan** with `Business PlanCustom`.
  - o Replace the display label **Business Plans** with `Business PlansCustom`.
3. Click **Save and Close**.

### Replace Business Plan Field Name

1. Go to Application Composer, go to **Standard Objects, Business Plan** object, click **Fields** and select **Business Plan**.
  - o Replace the display label **Business Plan** with `Business PlanCustom`.
2. Click **Save and Close**.

### Replace Objective

1. Go to Application Composer, expand Objective object.
2. Click **Fields** and select **Business Plan**.
  - o Replace the display label **Business Plan** with `Business PlanCustom`.
3. Click **Save and Close**.

### Replace Business Plan with Objective

You can replace the fields on the user interface text in the following manner:

1. Sign in using the administrator role, ensure you're in an active sandbox.
2. Add User interface text to Sandbox as a tool. Go to User interface text.
3. Change the following fields in the singular section:
  - o Replace **Business Plan** with **Objective**.
4. Include the content available in the following table:

Search	Replace	User Interface Text	Global Menu Label Text	Messages
Business Plan	Objective	<ul style="list-style-type: none"> <li>o Business Plan</li> <li>o Business Plan ID</li> <li>o The business plan is being copied.</li> <li>o Edit Business Plan</li> <li>o This business plan will be deleted. Do you want to continue?</li> <li>o New Business Plan Name</li> <li>o Create Business Plan</li> <li>o Delete Business Plan</li> </ul>	None	All messages

Search	Replace	User Interface Text	Global Menu Label Text	Messages
		<ul style="list-style-type: none"> <li>○ Copy Business Plan</li> <li>○ The business plan {BUS_PLAN} has been created.</li> <li>○ Business Plan Number</li> <li>○ Display Business Plan Name</li> <li>○ Business Plan Type</li> <li>○ Business Plan Status</li> <li>○ Business Plan Status Code</li> <li>○ Business Plan Class</li> <li>○ Business Plan Type Code</li> <li>○ Business Plan Resource ID</li> <li>○ Business Plan SWOT</li> <li>○ Business Plan Class Code</li> <li>○ Business Plan Description</li> <li>○ Business Plan Service</li> <li>○ Sales Business Plan</li> <li>○ Business Plan Period</li> <li>○ Business Plan Audit</li> <li>○ Business Plan Team</li> <li>○ Select and Add: Business Plan</li> </ul>		
Business Plan	Objective	<ul style="list-style-type: none"> <li>○ Business Plan KPI</li> <li>○ Business Plan KPIs</li> <li>○ Business Plan Name</li> <li>○ Find by Business Plan Name</li> <li>○ Product Business Plan</li> <li>○ The owner for this business plan isn't available.</li> </ul>	Not available	Not available

**5. Click Replace Strings.**

**Replace Business Plans with Objectives**

You can replace the fields on the user interface text in the following manner:

1. Sign in using the administrator role, ensure you're in an active sandbox.
2. Add User interface text to Sandbox as a tool. Go to User interface text.

3. Change the following fields in the plural section:
  - o Replace **Business Plans** with **Objectives**.
4. Include the content available in the following table:

Search	Replace	User Interface Text	Global Menu Label Text	Messages
Business Plans	Objectives	<ul style="list-style-type: none"> <li>o Business Plans</li> <li>o My Business Plans</li> <li>o All Business Plans</li> </ul>	Business Plans (Navigation menu item for sales business plans.)	None
Business Plans	Objectives	Not available	Business Plans (Menu label)	Not available

5. Click **Replace Strings**.

### Revert Business Plan Object Name

1. Go to Application Composer.
2. Expand Custom Objects.
3. Edit the Business Plan object.
4. Change the display label to **Business Plan** and plural label to **Business Plans**.

### Revert Business Plan Field name

1. Go to Application Composer.
2. Expand Standard Objects.
3. Expand Objective with the API Name as `BusinessPlanVO`.
4. Click **Fields** and select `Business PlanCustom`.
5. Change the display label to **Business Plan**.
6. Click Save and Close.

The terms are now replaced. You can revert all the custom objects, standard objects, and fields.

### Annual Calendar Settings

1. Sign in using the administrator role.
2. Navigate to **Setup and Maintenance**.
3. Search for and select **Manage Accounting Calendars**.
4. See the calendar in the profile option `ZCA_COMMON_CALENDAR`.
5. Click **Add Year** if the current year isn't on display.
6. Click **Save and Close**.

Repeat the above steps for adding more years.

During the turn of a year, ensure the new year is present in the ZCA COMMON CALENDAR to create objectives.

## Manage Marketing Development Funds

As marketing managers, you have access to create, edit, and delete Marketing Development Funds (MDF) records. The channel operations manager custom role can create, edit, and delete access to MDF records and add to the marketing manager users.

To add channel operations role to marketing manager users:

1. Navigate to **Users** on the **Security Console** in Tools.
2. Search for the marketing manager users.

**Tip:** Search for **Marketing Manager** to view a list of all the marketing manager users in the search results.

3. Select the marketing manager user individually.
4. Click **Edit**.
5. On the Roles section of the Edit User Account page, click **Add Role**.
6. On the Add Role Membership window, search for Channel Operations Manager Custom.
7. Select the Channel Operations Manager Custom role from the search results and click **Add Role Membership**.
8. Click **Done > Save and Close**.

The channel operations manager custom role is added to all the marketing manager users. The marketing manager users now have access to create, edit, and delete access to budgets and funds.



# 4 Custom Roles

## Assign Custom Roles to Users

Custom roles enable users to perform various tasks. As an administrator, you can assign custom roles to the users:

1. Navigate to **Tools > Security Console > Users tab**.
2. Search for the sales manager user role and click the user name.
3. Add sales manager custom role to this account.
4. Repeat steps for sales administrator, marketing manager, sales representative, channel account manager, channel operations manager, partner administrator, and partner sales manager.  
**Note:** For the sales administrator user ensure that you add the custom objects administrator role to the user. This role is required to create Import and Export artifacts.
5. Add channel operation manager custom role to the marketing manager user.

## Create Account Manager Custom Role

As an administrator, you can create the account manager custom role:

1. Go to **Tools > Security Console > Administration page > Roles**.
  - o Copied role name prefix: Account Manager
  - o Copied role name suffix: Custom
  - o Copied role code prefix: CRM\_  
**Note:** Ensure there is a space after the prefix for account manager and space before the suffix for CRM\_.
  - o Copied role name suffix: \_CUSTOM
2. Go to Security Console, **Roles** and search for the Sales Manager role.
3. Select the Sales Manager role. A visualization of the role and its hierarchy appears.  
The role code is `ORA_ZBS_SALES_MANAGER_JOB`.
4. In the search results, click the down arrow for the selected application role and select **Copy Role**.
5. In the Copy Options dialog box, select the copy option for **Copy Top Role** and **Inherited Roles**. Click **Copy Role**.
6. On the Copy Role: Basic Information page, review and edit:
  - o Role Name: Account Manager Custom
  - o Role Code: `ACCOUNT_MANAGER_CUSTOM`
  - o Description values as appropriate
7. Click the **Summary** and Impact Report train stop.

8. Click **Submit and Close**, then **OK** to close the confirmation message.
9. Select the check box for **Role Copy Status** in Administration tab. Wait for the status to be Complete.

## Create Account Manager User

As an administrator, you can create account manager user and associate other roles with the account manager custom role perform the following steps:

1. In the Setup and Maintenance work area, go to the following work area:
  - o Offering: Sales
  - o Functional Area: Users and Security
  - o Task: Manage Users
2. On the Manage Users page, click **Create** and complete the following steps to create a user:
  - a. Select resource role as **Sales Manager** and Person type as **Employee**.
  - b. Click **Autoprovision Roles**.
  - c. Remove sales manager from the list of provisioned roles.
3. Click **Save and Close**.
4. Use the navigator to go to **Tools > Security Console**.
5. On Security Console, navigate to **Administration page > Users tab**.
6. Search for the user created in the previous steps.
7. Create a user account and associate the following roles to it:
  - o Account manager custom
  - o Channel account manager custom

**Note:** For more information about creating the account manager custom role, see the topic on Creating Account Manager Custom Role.

8. Click **Reset Password** and reset the password after creating the user account

To associate the account manager user to the account manager custom role:

1. Search for the account manager user and click **Add Roles**.
2. Search for account manager custom role and add it and click **Save and Close**.

## Configure Cashier Role

As administrator, you configure the consumer goods cashier role. Cashiers review and close the route settlement report in collaboration with the sales representative.

Here's how you can configure the consumer goods cashier role:

1. Create the consumer goods cashier job role.
2. Create a resource role for the consumer goods cashier.
3. Create a provision rule for the consumer goods cashier.

4. Associate the consumer goods cashier role to individual users.

## Create Cashier Job Role

As administrators, you create the consumer goods cashier job role, as it's not predefined with the application. Job roles refer to the job functions, which users perform in an organization.

To create the consumer goods cashier job role:

1. Navigate to the Roles subtab of the Security Console and click **Create Role**.
2. Provide the following information about the Basic Information train stop:

Field	Value
Role Name	Consumer Goods Cashier
Role Code	ACO_CG_CASHIER_CUSTOM
Role Category	CRM - Job Roles

3. Navigate to the Functional Security Policies train stop and click **Add Function Security Policy**.
4. On the Add Function Security Policy window, perform the following steps:
  - a. Search for and select View Opportunity.
  - b. Click **Add Role to Privilege**.
5. Navigate to the Data Security Policies train stop and click **Create Data Security Policy**.
6. Provide the following information about the Create Data Security Policy dialog box and click **OK**:

Field	Value
Policy Name	Grant on Trading Community Party
Database Resource	Trading Community party
Start Date	Select a start date according to the requirements of your organization
Data Set	Select using instance set
Condition Name	Access the trading community person for table HZ_PARTIES for all resources in the enterprise
Actions	<input type="radio"/> Read

Field	Value
	<ul style="list-style-type: none"> <li>○ View Trading Community Resource</li> </ul>

7. Navigate to the Role Hierarchy train stop and click **Add Role**.
  8. On the Add Role Membership window, perform the following steps:
    - a. Search and select the following roles and click **Add Role Membership**:
      - Transactional Analysis Duty
      - BI Consumer Role
  9. Navigate to the Summary and Impact train stop and click **Save and Close**.
- The consumer goods cashier job role is created.

## Create Resource Role

As an administrator, you can create to describe the role of a user in the organization. You must create a resource role for the consumer goods cashier role.

To create a resource role for the consumer goods cashier role:

1. Sign in using the administrator role.
2. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Users and Security
  - Task: Manage Resource Roles
3. On the Manage Resource Roles page, click **Create** in the Search Results area.
4. Provide the following information about the Create Roles page:

Field	Value
Role Name	Consumer Goods Cashier
Role Code	ACO_CASHIER_CUSTOM
Role Type	Sales
Role Option	Member

5. Click **Save and Close**.
- Resource role is created for the consumer goods cashier.

## Create Provisioning Rule for Cashier Role

As administrators, map resource roles to required job roles with provisioning rules. Provisioning rules use resource role you assign to sales users as condition. You must create separate rule to provision resource roles to consumer goods cashier job role.

Here's how you can provision rules for the consumer goods cashier:

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Users and Security
  - o Task: Manage HCM Role Provisioning Rules
2. On the Manage HCM Role Provisioning Rules page, click **Create** in the Search Results area.
3. Specify the following details in the Create Role Mapping page:
  - o Mapping Name: Consumer Goods Cashier
  - o Specify these values in the Conditions area:

Field	Value
Resource Role	Consumer Goods Cashier
HR Assignment Status	Active

- o In the Associated Roles area:
    - i. Click **Add**.
    - ii. Add the following roles and select **Autoprovision** for each of them:
      - o Consumer Goods Cashier
      - o Employee
      - o Resource
4. Click **Save and Close**.

## Associate Cashier Role to Individual Users

As an administrator, you can associate the consumer goods cashier role with the users after you set up the role.

To associate the consumer goods cashier role to individual users:

1. Sign in using the administrator role.

2. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Users and Security
  - o Task: Manage Resource Organization Hierarchies
3. Search for Manage Users and select it from the search results.
4. On the Search Person page:
  - a. If you're associating the role to an existing user:
    - i. Search for the users name and select the user's record from the search result.
    - ii. On the Resource Information area of the Edit User page, select Consumer Goods Cashier role as the Resource Role.
    - iii. Click **Save and Close**.
  - b. If you're creating a user and associating the role:
    - i. Click **Create**.
    - ii. On the Create User page, define the user record.
    - iii. On the Resource Information area of the Edit User page, select Consumer Goods Cashier role as the Resource Role.
    - iv. Click **Save and Close**.
5. Click **Done** on the Search Person page.

The consumer goods cashier role is now associated with a user.

## Configure Partner Accounts

### Create and Associate Sales Account and Partner Records

As an administrator, you can create sales accounts and partner accounts for a retailer.

Complete the following steps to create and associate a retailer sales account with the retailer partner record:

**Note:** Set the `ZCM_ACC_EXACT_NAME_MATCH` profile option to `TRUE` before you create and associate a retailer sales account and associate it with partner record.

1. Create sales account
2. Create partner record and associating it with the sales record
3. Create partner record contacts
4. Create resource profile and a user account for the partner contact

### Create Sales Account

To create the sales account:

1. Go to Account and click **Create Account**.
2. Define the sales account record and click **Save and Close**.

The sales account for the retailer has been created.

## Create Partner Record and Associate it with Sales Record

To create the partner record:

1. Go to Partners in Partner Management and click **Create Partner**.
2. Provide the exact name and address for the partner record as provided for the sales account of the retailer and click **Save and Continue**.
3. Select the sales account record from the Possible Duplicates list.
4. Click **Save and Close**.

The partner record and the sales account of the retailer have been associated with each other.

## Create the Partner Record Contacts

To add a contact to the partner record:

1. Go to Partners in Partner Management and select the partner record you created.
2. Go to the Contacts subtab and click **Create Contact**.
3. Define the partner record and click **Save and Close > Save and Close**

The retailer partner record contact has been created.

## Create Resource Profile and User Account

To create a resource role and user account:

1. Go to Partners in Partner Management and select the partner record you created.
2. Go to the Contacts subtab and select the contact record you want to create the resource role and user account for.
3. Click **Manage User Details**.
4. Define the user details and select the Create User Account check box.
5. Click **OK > Save and Close**.

A resource profile and user account has been created for the retailer. An email containing the user account details will be mailed to the email ID provided.

The partner record and the sales account of the retailer have been created and associated.

## Import Partner Records for Existing Account Records

As an administrator, you create partner records for retailers with existing account records. You can create partner records with existing account records in bulk using import and export management.

To create partner records for retailers with existing account records using import and export management:

**Note:** Set the `zcm_acc_exact_name_match` profile option to `TRUE` before you create and associate a retailer sales account and associate the account with the retailer partner record.

1. Export the existing account records.
2. Prepare comma-separated values (.CSV) file for importing the partner records.

3. Import the partner records.

**Tip:** The user who creates the account records can import the partner records.

## Export Existing Account Records

As an administrator, export the existing account records:

1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Data Import and Export
  - o Task: Schedule Export Process
2. On the Overview page, click **Create**.
3. Provide a name for the export process and navigate to the **Configure Export Objects** train stop.
4. On the Export Objects area, click **Create**.
5. On the Manage Export Objects dialog box, move **Party** from Available Objects to Selected Objects and click **Done**.
6. On the details area, complete the following steps:
  - a. Expand the Attribute Name and select Enabled for the following attributes:
    - All the address attributes
    - City
    - `PartyId`
    - `PartyName`
  - b. On the Edit Filter Criteria column, click **Define criteria for selecting data to extract**.
  - c. On the Edit Filter Criteria window, complete the following steps:
    - i. Click the Add Fields drop-down list and select `PartyType`.
    - ii. On the `PartyType` row, select the following:
      - o **Operator:** =
      - o **PartyType:** ORGANIZATION
    - iii. Click **Save**.
    - iv. On the Create Saved Search window, complete the following steps:
      - o Name the saved search you just created.
      - o Click **OK**.
    - v. Click **OK**.
7. Navigate to the Create Schedule train stop and schedule the export process as the requirements of your organization.
8. Navigate to the Review train stop and click **Activate**.
9. On the Overview page, complete the following steps:
  - a. Select the export process you created.
  - b. On the History area, download the exported file from the Exported data file column.
10. Click **Done**.



The data from the existing account records is now downloaded.

## Prepare File for Import

Prepare the comma-separated values (.CSV) file for importing the partner records with the existing account records:

1. Open the file you just downloaded.
2. Create a comma-separated values file containing the information as represented in the following table:

**Note:**

- Ensure that the header row of the new file contains the header row as mentioned in the table.
- Ensure that the rows after the header row contain the details of each partner record that you want to create.

Party_ID	Party_Usage_Code	TREE_CODE	ZPM_PARTY0D	ZPM_STATUS	ZPM_PUB_STATUS
Provide the party ID as provided in the exported file.	PARTNER	Provide the party ID as provided in the exported file.	Provide the party ID as provided in the exported file.	ACTIVE	APPROVED

3. Save the file on your locally.

The comma-separated file has been prepared for importing the partner records.

## Import Partner Records

As a sales administrator, you import the partner records for retailers with existing account records:

1. In the Setup and Maintenance, go to the following work are:
  - Offering: Sales
  - Functional Area: Data Import and Export
  - Task: Manage File Import Activities
2. On the Manage Import Activities page, click **Create**.
3. On the Enter Import Options train stop, provide the following information:
  - On the Summary area, enter the relevant information and select Partner as the Object.
  - On the Source File area:

Field	Value
File Type	Text File
Upload From	Desktop

Field	Value
File Name	Select the file you prepared to import the partner records for retailers who have existing account records.
Data Type	Comma separated
Header row included	Select the check box.

- Navigate to the Map Fields train stop and on the Map Fields area, select the following for the Object column and the Attribute column:

Columns Header	Object	Attribute
PARTY_ID	PartnerInterface	PartyId
PARTY_USAGE_CODE	PartnerInterface	PartyUsageCode
TREE_CODE	PartnerHierarchy	TreeCode
ZPM_PARTYID	ImpPartnerP	PartyId
ZPM_STATUS	ImpPartnerP	Status
ZPM_PUB_STATUS	ImpPartnerP	PublicStatus

- Navigate to the Schedule train stop and schedule the export process as the requirements of your organization.
- Navigate to the Review and Activate train stop and click **Activate**.

The Manage Import Activities page tracks the status of your import.

The partner records for the retailers with existing account records are now created.

## Enable Access to Territories for Account Manager

As administrator, you can enable an account manager to access territories:

- Navigate to **Security Console > Administration > Manage Database Resources**.
- Search for MOT\_TERRITORIES in the Object Name field.
- In the search results, select the row for MOT\_TERRITORIES and click **Edit**.

4. On the Policy tab, click **Create**.
5. In the Create Policy dialog box, do the following:
  - a. On the General Information tab specify the following information:
    - Name: Grant for Account Manager
    - Module: Territory Management
  - b. On the Role tab:
    - i. Click **Add** and search for the role for which you're creating the data security policies using the following information for each of the objects:

Role Name	Search Fields
Account Manager Custom	Role Name: <b>ACCOUNT_MANAGER_CUSTOM</b>  Application: CRM

- ii. Select the above mentioned roles from the search result and click **OK**.
  - c. On the Rule tab, select **All Values** in the **Row Set** list.
  - d. On the Action tab, move all **Available Actions** to **Selected Actions** box.
  - e. Click **Save and Close**.
  - f. Click **Submit**.



# 5 Page Layouts

## How to Activate Layouts for Objects

As a sales administrator, you can create user layouts by duplicating the corresponding Industry Solutions layouts and assigning roles and expressions.

Use Application Composer to present standard pages using different page layouts defined by you. For example, a sales executive can see certain privileged fields on an opportunity record, which other sales team members can't see. Similarly, an open opportunity that's in progress might have certain fields different from a closed opportunity.

### Activate Layouts

Here's how you can activate the layouts and perform the settings as given in the following tables:

1. Go to Application Composer.
2. Select an application from the **Application** list.
3. Expand **Custom Objects** and expand the object, for example, Audit History.
4. Click **Pages** and in the Details Page Layouts area, do the following:
  - a. Select **All layouts** in the **Layout Status** list.
  - b. Click to select the Standard layout row.
  - c. Click **Actions-Duplicate**.
  - d. In the Duplicate Layout dialog, enter the **New Layout Name** for each object.
  - e. Click **Save and Close**.
  - f. Select the role for each object from the **Role** column.
  - g. Add an advanced expression by clicking the **Advanced Expression > Enter expression to determine which page layout to display** column. Click **OK**.

You can dynamically control the display of page layouts based on:

- Roles
- Groovy Scripts
- Type of Record

The order of activating layouts must be:

1. Landing page
2. Create
3. Detail
4. Search and Select Dialog or Reusable Regions

The following tables list the objects for which you must set the layouts and provides the values that you must specify, as applicable, for each object.

## Merchandising Specific Layouts

### Merchandise layouts for the Common application

In the common application, you must activate the merchandise layouts listed in the following table.

Object	Page Layout	Layout Name	Role	Advanced Expression
Audit History	Landing Page	ORACO Duplicate Layout	Any	
Audit History	Create	ORACO Duplicate Layout	Any	
Audit History	Detail	ORACO Duplicate Layout	Any	
Audit History	Search and Select Dialog	ORACO Duplicate Layout	Any	
Inventory	Landing Page	ORACO Duplicate Layout	Any	
Inventory	Create	ORACO Duplicate Layout	Any	
Inventory	Detail	ORACO Duplicate Layout	Any	
Inventory	Detail	ORACO DSD Duplicate Layout	Any	
Inventory	Search and Select Dialog	ORACO Duplicate Layout	Any	
Distributor	Landing Page	ORACO Duplicate Layout	Any	
Distributor	Create	ORACO Duplicate Layout	Any	
Distributor	Detail	ORACO Duplicate Layout	Any	
Distributor	Search and Select Dialog	ORACO Duplicate Layout	Any	
Order Line Request	Detail	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Order Line Request	Detail	ORACO Duplicate Layout	Any	
Shopping Cart Item	Detail	ORACO Duplicate Layout	Any	
Order	Landing Page	ORACO Duplicate Layout	Any	
Order	Landing Page	ORACO Telesales Duplicate Layout	Any	
Order	Create	ORACO Duplicate Layout	Any	
Order	Detail	ORACO Duplicate Layout	Any	
Order	Detail	After Submit	Any	<code>if( __ORACO__ OrderStatus_c == "ORA_ACO_ORDER_STATUS_SUBMITTED") return true;</code>
Order	Detail	ORACO Telesales Duplicate Layout	Any	
Order	Detail	ORACO Telesales Submitted Layout	Any	<code>if ( __ORACO__ OrderStatus_c == 'ORA_ACO_ORDER_STATUS_SUBMITTED'    __ORACO__ OrderStatus_c == 'ORA_ACO_ORDER_STATUS_PARTIAL'    __ORACO__ OrderStatus_c == 'ORA_ACO_ORDER_STATUS_DELIVERED') { return true }</code>
Order	Detail	ORACO Telesales Booked Layout	Any	<code>if ( __ORACO__ OrderStatus_c == 'ORA_ACO_ORDER_STATUS_BOOKED'){ return true }</code>
Order	Detail	ORACO Telesales Cancel Request Layout	Any	<code>if ( __ORACO__ OrderStatus_c == 'ORA_ACO_ORDER_STATUS_CANCELREQ'){ return true }</code>

Object	Page Layout	Layout Name	Role	Advanced Expression
Order	Detail	ORACO Telesales Cancel Reject Layout	Any	<pre>if (__ORACO__ OrderStatus_c == 'ORA_ ACO_ORDER_STATUS_ CANCELREJ'){ return true }</pre>
Order	Detail	ORACO Telesales Canceled Layout	Any	<pre>if (__ORACO__ OrderStatus_c == 'ORA_ ACO_ORDER_STATUS_ CANCELED'){ return true }</pre>
Order	Search and Select Dialog	ORACO Duplicate Layout	Any	
Order	Search and Select Dialog	ORACO Telesales Duplicate Layout	Any	
Shopping Cart	Landing Page	ORACO Duplicate Layout	Any	
Shopping Cart	Create	ORACO Duplicate Layout	Any	
Shopping Cart	Detail	ORACO Duplicate Layout	Any	
Shopping Cart	Search and Select Dialog	ORACO Duplicate Layout	Any	
UOM Conversion	Landing Page	ORACO Duplicate Layout	Any	
UOM Conversion	Create	ORACO Duplicate Layout	Any	
UOM Conversion	Detail	ORACO Duplicate Layout	Any	
UOM Conversion	Search and Select Dialog	ORACO Duplicate Layout	Any	
Account	Landing Page	ORACO Duplicate Layout	Any	
Account	Create	ORACO Duplicate Layout	Any	



Object	Page Layout	Layout Name	Role	Advanced Expression
Account	Detail	ORACO Duplicate Layout	Any	
Account	Detail	ORACO Sales Representative Layout	Sales Representative Custom	
Account	Detail	ORACO Sales Manager Layout	Sales Manager Custom, Account Manager Custom	
Account	Detail	ORACO Marketing Manager Layout	Marketing Manager Custom	
Account	Search and Select Dialog	ORACO Duplicate Layout	Any	
Business Plan	Landing Page	ORACO Duplicate Layout	Any	
Business Plan	Create	ORACO Duplicate Layout	Any	
Business Plan	Detail	ORACO Duplicate Layout	Any	
Business Plan	Detail	ORACO Duplicate Layout For Revise Objective	Any	<code>if (__ORACO__Status_c == 'ORA_ACO_BP_REVISION'){ return true; }</code>
Business Plan	Detail	ORACO Duplicate Layout For Active Objective	Any	<code>if (__ORACO__Status_c == 'ORA_ACO_BP_ACTIVE'){ return true; }</code>
Business Plan	Detail	ORACO Duplicate Layout For Rejected Objective	Any	<code>if (__ORACO__Status_c == 'ORA_ACO_BP_REJECTED'){ return true; }</code>
Business Plan	Detail	ORACO Duplicate Layout For Approved Objective	Any	<code>if (__ORACO__Status_c == 'ORA_ACO_BP_APPROVED'){ return true; }</code>
Business Plan	Detail	Admin MktMgr Layout For Approved Objective	Sales Administrator Custom Marketing Management Custom	<code>if (__ORACO__Status_c == 'ORA_ACO_BP_APPROVED'){ return true; }</code>

Object	Page Layout	Layout Name	Role	Advanced Expression
Business Plan	Detail	ORACO Duplicate Layout For Pending Objective	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_BP_PENDING'){ return true; }</pre>
Business Plan	Detail	ORACO Duplicate Layout For Draft Objective	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_BP_DRAFT'){ return true; }</pre>
Business Plan	Detail	ORACO Duplicate Layout For Publishing Objective	Any	<pre>if ((__ORACO__Status_c == 'ORA_ACO_BP_PLANPUBLISHED')    (__ORACO__Status_c == 'ORA_ACO_BP_PUBLISHED')){ return true; }</pre>
Business Plan	Detail	ORACO Duplicate Layout For Scheduled Objective	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_BP_SCHEDULED'){ return true; }</pre>
Business Plan	Search and Select Dialog	ORACO Duplicate Layout	Any	
Business Plan __ORACO__BusinessPlan_c	Landing Page	ORACO Duplicate Layout	Any	
Business Plan __ORACO__BusinessPlan_c	Create	ORACO Duplicate Layout	Any	
Business Plan __ORACO__BusinessPlan_c	Detail	ORACO Duplicate Layout	Any	
Business Plan __ORACO__BusinessPlan_c	Detail	ORACO Duplicate Layout For Revise Plan	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_BP_REVISION'){ return true; }</pre>
Business Plan __ORACO__BusinessPlan_c	Detail	ORACO Duplicate Layout For Active Plan	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_BP_ACTIVE'){ return true; }</pre>
Business Plan __ORACO__BusinessPlan_c	Detail	ORACO Duplicate Layout For Rejected Plan	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_BP_REJECTED'){ return true; }</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
Business Plan __ORACO__BusinessPlan_c	Detail	ORACO Duplicate Layout For Approved Plan	Any	if (__ORACO__Status_c == 'ORA_ACO_BP_APPROVED'){ return true; }
Business Plan __ORACO__BusinessPlan_c	Detail	Admin MktMgr For Approved Plan	Sales Administrator Custom Marketing Manager Custom	if (__ORACO__Status_c == 'ORA_ACO_BP_APPROVED'){ return true; }
Business Plan __ORACO__BusinessPlan_c	Detail	ORACO Duplicate Layout For Pending Plan	Any	if (__ORACO__Status_c == 'ORA_ACO_BP_PENDING'){ return true; }
Business Plan __ORACO__BusinessPlan_c	Detail	ORACO Duplicate Layout For Draft Plan	Any	if (__ORACO__Status_c == 'ORA_ACO_BP_DRAFT'){ return true; }
Business Plan __ORACO__BusinessPlan_c	Detail	ORACO Duplicate Layout For Publishing Plan	Any	if (__ORACO__Status_c == 'ORA_ACO_BP_PLANPUBLISHED') { return true; }
Business Plan __ORACO__BusinessPlan_c	Detail	ORACO Duplicate Layout For Scheduled Plan	Any	if (__ORACO__Status_c == 'ORA_ACO_BP_SCHEDULED'){ return true; }
Business Plan __ORACO__BusinessPlan_c	Search and Select Dialog	ORACO Duplicate Layout	Any	

### Merchandise layouts for the Sales application

In the Sales application, you must activate the merchandise layouts listed in the following table.

Object	Page Layout	Layout Name	Role	Advanced Expression
Promotion	Landing Page	ORACO Duplicate Layout	Any	
Promotion	Create	ORACO Duplicate Layout	Any	
Promotion	Detail	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Promotion	Detail	Approved Layout	Sales Representative Custom	<code>if(_ORACO_Status_c=='ORA_ACO_PROMOTION_APPROVED') return true</code>
Promotion	Detail	Approved Layout	Sales Manager Custom	
Promotion	Detail	Approved Layout for MM	Marketing Manager Custom	<code>if(_ORACO_Status_c=='ORA_ACO_PROMOTION_APPROVED') return true</code>
Promotion	Detail	Draft Layout For Non AM	Marketing Manager Custom	<code>if(_ORACO_Status_c=='ORA_ACO_PROMOTION_APPROVED') return true</code>
Promotion	Detail	Draft Layout For Non AM	Sales Representative Custom	
Promotion	Detail	Draft Layout For Non AM	Sales Manager Custom	
Promotion	Detail	Draft Layout For AM	Sales Administrator Custom	<code>if(_ORACO_Status_c=='ORA_ACO_PROMOTION_DRAFT') return true</code>
Promotion	Detail	Draft Layout For AM	Account Manager Custom	
Promotion	Detail	Approved Layout For AM	Sales Administrator Custom	<code>if(_ORACO_Status_c=='ORA_ACO_PROMOTION_APPROVED') return true</code>
Promotion	Detail	Approved Layout For AM	Account Manager Custom	
Promotion	Search and Select Dialog	ORACO Duplicate Layout	Any	
Promotion Program	Landing Page	ORACO Duplicate Layout	Any	
Promotion Program	Create	ORACO Duplicate Default Layout	Any	
Promotion Program	Detail	ORACO Duplicate Layout	Any	
Promotion Program	Detail	Approved Layout	Any	<code>if(_ORACO_Status_c=='ORA_ACO_PROMO_</code>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<code>PROG_APPROVED') return true</code>
Promotion Program	Detail	<b>Marketing Manager Draft Layout</b>	Marketing Manager Custom	<code>if( __ORACO__Status_c=='ORA_ACO_PROMO_PROG_DRAFT') return true</code>
Promotion Program	Search and Select Dialog	<b>ORACO Duplicate Layout</b>	Any	
Store Visit Tasks	Landing Page	<b>ORACO Duplicate Layout</b>	Any	
Store Visit Tasks	Create	<b>ORACO Duplicate Layout</b>	Any	
Store Visit Tasks	Detail	<b>ORACO Duplicate Layout</b>	Any	
Store Visit Tasks	Detail	<b>ORACO Layout for Roles</b>	Sales Manager Custom	
Store Visit Tasks	Detail	<b>ORACO Layout for Roles</b>	Sales Representative Custom	
Store Visit Tasks	Detail	<b>ORACO Layout for Roles</b>	Marketing Manager Custom	
Store Visit Tasks	Detail	<b>ORACO Layout for Roles</b>	Account Manager Custom	
Store Visit Tasks	Search and Select Dialog	<b>ORACO Duplicate Layout</b>	Any	
Store Visit Type	Landing Page	<b>ORACO Duplicate Layout</b>	Any	
Store Visit Type	Create	<b>ORACO Duplicate Layout</b>	Any	
Store Visit Type	Detail	<b>ORACO Duplicate Layout</b>	Any	
Store Visit Type	Detail	<b>ORACO Layout for Roles</b>	Sales Manager Custom	

Object	Page Layout	Layout Name	Role	Advanced Expression
Store Visit Type	Detail	ORACO Layout for Roles	Sales Representative Custom	
Store Visit Type	Detail	ORACO Layout for Roles	Marketing Manager Custom	
Store Visit Type	Detail	ORACO Layout for Roles	Account Manager Custom	
Store Visit Type	Detail	ORACO Dynamic Type Layout	Any	<pre>if( __ORACO__SchedulingMethod_c=='ORA_ACO_TASK_SCHED_DYNAMIC') { return true; }</pre>
Store Visit Type	Search and Select Dialog	ORACO Duplicate Layout	Any	
Trade Fund	Landing Page	ORACO Duplicate Layout	Any	
Trade Fund	Create	ORACO Duplicate Layout	Any	
Trade Fund	Detail	Draft Layout	Any	<pre>if( __ORACO__Status_c=='ORA_ACO_TRADE_FUND_DRAFT') return true</pre>
Trade Fund	Detail	Active Layout	Any	<pre>if( __ORACO__Status_c=='ORA_ACO_TRADE_FUND_ACTIVE') return true</pre>
Trade Fund	Detail	Inactive Layout	Any	<pre>if( __ORACO__Status_c=='ORA_ACO_TRADE_FUND_INACTIVE') return true</pre>
Trade Fund	Search and Select Dialog	ORACO Duplicate Layout	Any	
Activity	Appointment Landing Page	ORACO Duplicate Layout	Any	
Activity	Appointment Create	ORACO Duplicate Layout	Any	
Activity	Appointment Details	Before Check In Layout	Any	<pre>if( __ORACO__VisitStatusFCL_</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>c=='ORA_ACO_VISIT_STATUS_NSTARTED'){ return true }else{ return false }</pre>
Activity	Appointment Details	After Check In Layout	Any	<pre>if(__ORACO__VisitStatusFCL_c=='ORA_ACO_VISIT_STATUS_INPROGR'){ return true }else{ return false }</pre>
Activity	Appointment Details	After Checkout Layout	Any	<pre>if(__ORACO__VisitStatusFCL_c=='ORA_ACO_VISIT_STATUS_COMPLETED'){ return true }else{ return false }</pre>
Activity	Embedded Activity Summary Layout	ORACO Duplicate Layout	Any	
Activity (Task Layout)	Task Create	ORACO Duplicate Layout	Any	
Activity (Task Layout)	Task Create	ORACO BusPlan Layout	Any	<pre>if(BusinessPlanName != null){ return true; }</pre>
Activity (Task Layout)	Task Create	ORACO Contract Layout	Any	<pre>if(__ORACO__ContractTemplate_Obj_c?.RecordName != null    __ORACO__Contract_Obj_c?.RecordName != null){ return true; }</pre>
Activity (Task Layout)	Task Details	ORACO Duplicate Layout	Any	
Activity (Task Layout)	Task Details	ORACO BusPlan Layout	Any	<pre>if(BusinessPlanName != null){ return true; }</pre>
Activity (Task Layout)	Task Details	ORACO Contract Layout	Any	<pre>if(__ORACO__ContractTemplate_Obj_c?.RecordName != null    __ORACO__Contract_Obj_c?.RecordName != null){ return true; }</pre>
Priority Portfolio	Landing page	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Priority Portfolio	Create	ORACO Duplicate Layout	Any	
Priority Portfolio	Detail	ORACO Duplicate Layout	Any	
Priority Portfolio	Search and Select Dialog	ORACO Duplicate Layout	Any	
Product Group	Landing page	ORACO Duplicate Layout	Any	
Product Group	Create	ORACO Duplicate Layout	Any	
Product Group	Detail	ORACO Duplicate Layout	Any	
Product Group	Search and Select Dialog	ORACO Duplicate Layout	Any	
Product	Landing page	ORACO Duplicate Layout	Any	
Product	Create	ORACO Duplicate Layout	Any	
Product	Detail	ORACO Duplicate Layout	Any	
Product	Search and Select Dialog	ORACO Duplicate Layout	Any	
Attainment	Create	ORACO Duplicate Layout	Any	
Attainment	Detail	ORACO Duplicate Layout	Any	
Benefit	Create	ORACO Duplicate Layout	Any	
Benefit	Detail	ORACO Duplicate Layout	Any	



Object	Page Layout	Layout Name	Role	Advanced Expression
Benefit	Detail	ORACO Duplicate Layout OD	Any	<pre> if(__ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_OD' &amp;&amp; __ORACO_ _Negotiable_c == 'N' &amp;&amp; __ORACO_ CGContractTemplate_Id_ c == null &amp;&amp; __ORACO_ Contract_Id_c != null) { return true; } else { return false; } </pre>
Benefit	Detail	ORACO Duplicate Layout PD	Type	<pre> if(__ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_PD' &amp;&amp; __ORACO_ _Negotiable_c == 'N' &amp;&amp; __ORACO_ CGContractTemplate_Id_ c == null &amp;&amp; __ORACO_ Contract_Id_c != null) { return true; } else { return false; } </pre>
Benefit	Detail	ORACO Duplicate Layout DC	Type	<pre> if((__ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_DC' &amp;&amp; __ORACO_ _Negotiable_c == 'N' &amp;&amp; __ORACO_ CGContractTemplate_ Id_c == null &amp;&amp; __ ORACO_Contract_Id_ c != null)  (__ORACO_ _Type_c=='ORA_ACO_ BENEFIT_TYPE_LP' &amp;&amp; __ORACO_Negotiable_ c == 'N' &amp;&amp; __ORACO_ CGContractTemplate_ Id_c == null &amp;&amp; __ ORACO_Contract_Id_c ! = null)) { return true; } else { return false; } </pre>
Benefit	Detail	ORACO Duplicate Layout LLA	Type	<pre> if(__ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_LLA' &amp;&amp; __ORACO_ </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>CGContractTemplate_Id_c == null &amp;&amp; __ORACO__ Contract_Id_c != null) { return true; } else { return false; }</pre>
Benefit	Detail	ORACO Duplicate Layout Negotiable OD	Type	<pre>if(__ORACO__Type_c=='ORA_ACO_BENEFIT_ TYPE_OD' &amp;&amp; __ORACO__ Negotiable_c == 'Y' &amp;&amp; __ORACO__ CGContractTemplate_Id_c != null &amp;&amp; __ORACO__ Contract_Id_c == null) { return true; } else { return false; }</pre>
Benefit	Detail	ORACO Duplicate Layout Negotiable PD	Type	<pre>if(__ORACO__Type_c=='ORA_ACO_BENEFIT_ TYPE_PD' &amp;&amp; __ORACO__ Negotiable_c == 'Y' &amp;&amp; __ORACO__ CGContractTemplate_Id_c == null &amp;&amp; __ORACO__ Contract_Id_c != null) { return true; } else { return false; }</pre>
Benefit	Detail	ORACO Duplicate Layout Negotiable DC	Type	<pre>if((__ORACO__Type_c=='ORA_ACO_BENEFIT_ TYPE_DC' &amp;&amp; __ORACO__ Negotiable_c == 'Y' &amp;&amp; __ORACO__ CGContractTemplate_Id_c == null &amp;&amp; __ ORACO__Contract_Id_c != null)   (__ORACO__Type_c=='ORA_ACO_BENEFIT_ TYPE_LP' &amp;&amp; __ORACO__ Negotiable_c == 'Y' &amp;&amp; __ORACO__ CGContractTemplate_Id_c == null &amp;&amp; __</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> ORACO_Contract_Id_c != null)) { return true; } else { return false; } </pre>
Benefit	Detail	ORACO Duplicate Layout OD Template	Type	<pre> if(__ORACO_Type_c=='ORA_ACO_BENEFIT_TYPE_OD' &amp;&amp; __ORACO_Negotiable_c == 'N' &amp;&amp; __ORACO_CGContractTemplate_Id_c != null &amp;&amp; __ORACO_Contract_Id_c == null) { return true; } else { return false; } </pre>
Benefit	Detail	ORACO Duplicate Layout PD Template	Type	<pre> if(__ORACO_Type_c=='ORA_ACO_BENEFIT_TYPE_PD' &amp;&amp; __ORACO_Negotiable_c == 'N' &amp;&amp; __ORACO_CGContractTemplate_Id_c != null &amp;&amp; __ORACO_Contract_Id_c == null) { return true; } else { return false; } </pre>
Benefit	Detail	ORACO Duplicate Layout DC Template	Type	<pre> if((__ORACO_Type_c=='ORA_ACO_BENEFIT_TYPE_DC' &amp;&amp; __ORACO_Negotiable_c == 'N' &amp;&amp; __ORACO_CGContractTemplate_Id_c != null &amp;&amp; __ORACO_Contract_Id_c == null)   (__ORACO_Type_c=='ORA_ACO_BENEFIT_TYPE_LP' &amp;&amp; __ORACO_Negotiable_c == 'N' &amp;&amp; __ORACO_CGContractTemplate_Id_c != null &amp;&amp; __ORACO_Contract_Id_c == null)) </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>{ return true; } else { return false; }</pre>
Benefit	Detail	ORACO Duplicate Layout LLA Template	Type	<pre>if( __ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_LLA' &amp;&amp; __ORACO_ CGContractTemplate_Id_ c != null &amp;&amp; __ORACO_ Contract_Id_c == null) { return true; } else { return false; }</pre>
Benefit	Detail	ORACO Duplicate Layout Negotiable OD Template	Type	<pre>if( __ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_OD' &amp;&amp; __ORACO_ Negotiable_c == 'Y' &amp;&amp; __ORACO_ CGContractTemplate_Id_ c == null &amp;&amp; __ORACO_ Contract_Id_c != null) { return true; } else { return false; }</pre>
Benefit	Detail	ORACO Duplicate Layout Negotiable PD Template	Type	<pre>if( __ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_PD' &amp;&amp; __ORACO_ Negotiable_c == 'Y' &amp;&amp; __ORACO_ CGContractTemplate_Id_ c != null &amp;&amp; __ORACO_ Contract_Id_c == null) { return true; } else { return false; }</pre>
Benefit	Detail	ORACO Duplicate Layout Negotiable DC Template	Type	<pre>if(( __ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_DC' &amp;&amp; __ORACO_ Negotiable_c == 'Y' &amp;&amp; __ORACO_ CGContractTemplate_</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> Id_c != null &amp;&amp; __ ORACO_Contract_Id_c == null)   ( __ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_DC' &amp;&amp; __ORACO_ _Negotiable_c == 'Y' &amp;&amp; __ORACO_ CGContractTemplate_ Id_c != null &amp;&amp; __ ORACO_Contract_Id_c == null)) { return true; } else { return false; } </pre>
Benefit	Detail	ORACO Duplicate Layout OD CC	Type	<pre> if(__ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_OD' &amp;&amp; (__ORACO_ _Contract_Obj_c?._ _ORACO_Status_c == 'CANCELED'    __ ORACO_Contract_Obj_ c?._ORACO_Status_ c == 'CLOSED'    __ ORACO_Contract_Obj_ c?._ORACO_Status_ c == 'EXPIRED')) { return true; } else { return false; } </pre>
Benefit	Detail	ORACO Duplicate Layout PD CC	Type	<pre> if(__ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_PD' &amp;&amp; (__ORACO_ _Contract_Obj_c?._ _ORACO_Status_c == 'CANCELED'    __ ORACO_Contract_Obj_ c?._ORACO_Status_ c == 'CLOSED'    __ ORACO_Contract_Obj_ c?._ORACO_Status_ c == 'EXPIRED')) { return true; } else { return false; } </pre>
Benefit	Detail	ORACO Duplicate Layout DC CC	Type	<pre> if(__ORACO_Type_ c=='ORA_ACO_BENEFIT_ TYPE_DC' &amp;&amp; (__ORACO_ _Contract_Obj_c?._ _ORACO_Status_c == 'CANCELED'    __ ORACO_Contract_Obj_ c?._ORACO_Status_ c == 'CLOSED'    __ ORACO_Contract_Obj_ </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>c?._ORACO_Status_c == 'EXPIRED')) { return true; } else { return false; }</pre>
Benefit	Detail	ORACO Benefit History Layout	Any	<pre>if(CGContractHistory_ _ORACO_ ContractHistoryToBenefit_ Src != null) {return true;} else {return false;}</pre>
Benefit Balance	Detail	ORACO Duplicate Layout	Any	
Benefit Guard	Create	ORACO DC Layout	Any	<pre>if(_ORACO_Benefit_ Obj_c?._ORACO_Type_ c == 'ORA_ACO_BENEFIT_ TYPE_DC') { setAttribute('_ORACO_ GuardType_c', 'ORA_ ACO_DISCOUNT_AMOUNT'); return true; }</pre>
Benefit Guard	Create	ORACO PD Layout	Any	<pre>if(_ORACO_Benefit_ Obj_c?._ORACO_Type_c == 'ORA_ACO_BENEFIT_ TYPE_PD') { return true; }</pre>
Benefit Guard	Detail	ORACO Duplicate Layout	Any	
Benefit Transaction	Detail	ORACO Duplicate Layout	Any	
Compliance History	Detail	ORACO Duplicate Layout	Any	
Condition	Create	ORACO Duplicate Layout	Any	
Condition	Detail	ORACO Duplicate Layout	Any	
Condition	Detail	ORACO Manual Negotiable Layout	Any	<pre>if(_ORACO_ Negotiable_c == 'Y' &amp;&amp; _ORACO_ Type_c == 'ORA_ACO_ CONDITION_TYPE_M' &amp;&amp; _ORACO_Benefit_</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				Obj_c?._ORACO__CGContractTemplate_Id_c == null) { return true; } else { return false; }
Condition	Detail	ORACO Manual Non Negotiable Layout	Any	if(_ORACO__Negotiable_c == 'N' && _ORACO__Type_c == 'ORA_ACO__CONDITION_TYPE_M' && _ORACO__Benefit_Obj_c?._ORACO__CGContractTemplate_Id_c == null) { return true; } else { return false; }
Condition	Detail	ORACO Automatic Non Negotiable Layout	Any	if(_ORACO__Negotiable_c == 'Y' && _ORACO__Type_c != 'ORA_ACO__CONDITION_TYPE_M' && _ORACO__Benefit_Obj_c?._ORACO__CGContractTemplate_Id_c == null) { return true; } else { return false; }
Condition	Detail	ORACO Automatic Negotiable Layout	Any	if(_ORACO__Negotiable_c == 'N' && _ORACO__Type_c != 'ORA_ACO__CONDITION_TYPE_M' && _ORACO__Benefit_Obj_c?._ORACO__CGContractTemplate_Id_c == null) { return true; } else { return false; }
Condition	Detail	ORACO Non Negotiable Template Layout	Any	if(_ORACO__Negotiable_c == 'N' && _ORACO__Benefit_Obj_c?._ORACO__CGContractTemplate_Id_c != null) { return true; } else { return false; }
Condition	Detail	ORACO Template Negotiable Layout		if(_ORACO__Negotiable_c == 'Y' && _ORACO__Benefit_Obj_c?._ORACO__CGContractTemplate_Id_c != null) { return

Object	Page Layout	Layout Name	Role	Advanced Expression
				<code>true; } else { return false; }</code>
Condition	Detail	ORACO Condition History Layout	Any	<code>if( __ORACO__Benefit_Obj_c?.CGContractHistory__ORACO__ContractHistoryToBenefit_Src != null) {return true;} else {return false;}</code>
Condition Compliance History	Create	ORACO Duplicate Layout	Any	
Condition Compliance History	Detail	ORACO Condition History Layout	Any	<code>if( __ORACO__Benefit_Obj_c?.CGContractHistory__ORACO__ContractHistoryToBenefit_Src != null) {return true;} else {return false;}</code>
Condition Compliance History	Detail	ORACO Duplicate Layout	Any	
Condition Guard	Create	ORACO Duplicate Layout	Any	
Condition Guard	Detail	ORACO Duplicate Layout	Any	
Condition Template	Landing Page	ORACO Duplicate Layout	Any	
Condition Template	Create	ORACO Duplicate Layout	Any	
Condition Template	Detail	ORACO Duplicate Layout	Any	
Contract	Landing Page	ORACO Duplicate Layout	Any	
Contract	Create	ORACO Duplicate Layout	Any	
Contract	Detail	ORACO Duplicate Layout	Any	



Object	Page Layout	Layout Name	Role	Advanced Expression
Contract	Detail	ORACO Pending Approval Layout	Any	<pre>if( __ORACO__Status_c == 'PENDING_APPROVAL') { return true; } else { return false; }</pre>
Contract	Detail	ORACO Draft Layout	Any	<pre>if( __ORACO__Status_c == 'DRAFT') { return true; } else { return false; }</pre>
Contract	Search	ORACO Duplicate Layout	Any	
Contract History	Landing Page	ORACO Duplicate Layout	Any	
Contract History	Create	ORACO Default Layout	Any	
Contract History	Detail	ORACO Duplicate Layout	Any	
Contract History	Search	ORACO Duplicate Layout	Any	
Contract Print Template	Landing Page	ORACO Duplicate Layout	Any	
Contract Print Template	Create	ORACO Duplicate Layout	Any	
Contract Print Template	Detail	ORACO Duplicate Layout	Any	
Contract Template	Landing Page	ORACO Duplicate Layout	Any	
Contract Template	Create	ORACO Duplicate Layout		
Contract Template	Detail	ORACO Scheduled Layout	Any	<pre>if ( __ORACO__Status_c == 'ORA_ACO_CNTRCT_TPL_ST_SCHED'){ return true; }</pre>
Contract Template	Detail	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Contract Template	Detail	ORACO Duplicate Layout For Schedule with AccClustr	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_PRNT_TMPL_STATUS_S') { return true; }</pre>
Contract Template	Detail	ORACO Default Layout		
Contract Template	Detail	ORACO Revised Layout	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_CNTRCT_TPL_ST_REVISIED') { return true; }</pre>
Contract Template	Detail	ORACO Revised Layout for Marketing Admin	Sales Administrator Custom Marketing Manager Custom	<pre>if (__ORACO__Status_c == 'ORA_ACO_CNTRCT_TPL_ST_REVISIED') { return true; }</pre>
Contract Template	Detail	ORACO Inactive Layout	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_CNTRCT_TPL_ST_INACTIVE') { return true; }</pre>
Contract Template	Detail	ORACO Inactive Layout for Marketing Admin	Sales Administrator Custom Marketing Manager Custom	<pre>if (__ORACO__Status_c == 'ORA_ACO_CNTRCT_TPL_ST_INACTIVE') { return true; }</pre>
Contract Template	Detail	ORACO Active Layout	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_CNTRCT_TPL_ST_ACTIVE') { return true; }</pre>
Contract Template	Detail	ORACO Published Layout	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_CNTRCT_TPL_ST_PUBLISH') { return true; }</pre>
Contract Template	Detail	ORACO Draft Layout	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_CNTRCT_TPL_ST_DRAFT'    __ORACO__Status_c == null){ return true; }</pre>
Contract Template	Detail	ORACO Draft Layout for Marketing Admin	Sales Administrator Custom Marketing Manager Custom	<pre>if (__ORACO__Status_c == 'ORA_ACO_CNTRCT_TPL_ST_DRAFT'    __ORACO__Status_c == null){ return true; }</pre>
Contract Template	Detail	ORACO Scheduled Layout		<pre>if (__ORACO__Status_c == 'ORA_ACO_</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<code>CNTRCT_TPL_ST_SCHED') { return true; }</code>
Contract Template	Search	ORACO Duplicate Layout	Any	
Distribution Schedule	Create	ORACO Duplicate Layout	Any	
Distribution Schedule	Detail	ORACO Duplicate Layout	Any	
Forecast Attainment	Create	ORACO Duplicate Layout	Any	
Forecast Attainment	Detail	ORACO Duplicate Layout	Any	
MDF Request	Create	ORACO Benefit Fund Layout	Any	<code>if (__ORACO__Benefit_ Id_c != null)  {      setAttribute('__ORACO__AllocationType_c', 'ORA_ACO_CONTRACT');      return true  }  else  {      return false  };</code>
MDF Request	Detail	ORACO Benefit Fund Layout	Any	<code>if (__ORACO__Benefit_ Id_c != null) {return true} else {return false};</code>
MDF Claim	Detail	ORACO Duplicate Layout	Any	<code>if (__ORACO__ClaimRequest_Id_c! =null    __ORACO__DeductionRequest_Id_c!=null    FundRequest?.__ORACO__Benefit_Id_c != null)  return true</code>

Object	Page Layout	Layout Name	Role	Advanced Expression
Resolution	Create	ORACO Benefit Settlement Layout	Any	<pre> if( __ORACO__Benefit_ Id_c != null) { try { __ORACO__ autoFillBenefitSettlement(); } catch(Exception ex) { println(ex.toString()); return false; } return true } else { return false }; </pre>
Resolution	Detail	ORACO Benefit Settlement Layout	Any	<pre> if( __ORACO__Benefit_ Id_c != null) {return true} else {return false}; </pre>
Term	Landing Page	ORACO Duplicate Layout	Any	
Term	Create	ORACO Contract Term Layout	Any	<pre> if( __ORACO__Contract_ Id_c!=null) { return true; } </pre>
Term	Detail	ORACO Term History Layout	Any	<pre> if(CGContractHistory_ __ORACO__ ContractHistoryToTerms_ Src != null) {return true;} else {return false}; </pre>
Term	Detail	ORACO Contract Template Term Layout	Any	<pre> if( __ORACO__ ContractTemplate_ Id_c!=null) { return true; } </pre>
Term	Detail	ORACO Contract Term Layout	Any	<pre> if( __ORACO__Contract_ Id_c!=null) { return true; } </pre>
Term	Detail	ORACO Duplicate Layout	Any	
Term	Detail	ORACO Pending Approval Layout	Any	<pre> if ( __ORACO__Contract_ Obj_c?. __ORACO__ Status_c == "ACTIVE"    __ORACO__Contract_ Obj_c?. __ORACO__ Status_c == "PENDING_ </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				APPROVAL") {return true;} else {return false;}
Term	Detail	ORACO Term History Layout	Any	if(CGContractHistory_ _ORACO_ ContractHistoryToTerms Src != null) {return true;} else {return false;}
Term	Search	ORACO Duplicate Layout	Any	
Object Attributes	Landing Page	ORACO Duplicate Layout	Any	
Object Attributes	Create	ORACO Duplicate Layout	Any	
Object Attributes	Detail	ORACO Duplicate Layout	Any	
Object Attributes	Search and Select Dialog	ORACO Duplicate Layout	Any	
Object Configuration	Landing Page	ORACO Duplicate Layout	Any	
Object Configuration	Create	ORACO Duplicate Layout	Any	
Object Configuration	Detail	ORACO Duplicate Layout	Any	
Object Configuration	Search and Select Dialog	ORACO Duplicate Layout	Any	
Filter Criteria Group	Landing Page	ORACO Duplicate Layout	Any	
Filter Criteria Group	Create	ORACO Duplicate Layout	Any	
Filter Criteria Group	Detail	ORACO Duplicate Layout	Any	
Filter Criteria Group	Search and Select Dialog	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Filter Criteria	Create	ORACO Duplicate Layout	Any	
Filter Criteria	Detail	ORACO Duplicate Layout	Any	
Filter Criteria	Detail	ORACO RETPL Layout	Any	<pre>def checkOption =oracle.apps.fnd.applcore.Pro ACO_USE_SYNC_RULES_ FOR_RETPL')  if(checkOption == 'Y'    checkOption == 'y') {return true;} else {return false;}</pre>
Sync Rule	Landing Page	ORACO Duplicate Layout	Any	
Sync Rule	Landing Page	ORACO RETPL Layout	Any	
Sync Rule	Create	ORACO Duplicate Layout	Any	
Sync Rule	Create	ORACO RETPL Layout	Any	<pre>def checkOption =oracle.apps.fnd.applcore.Pro ACO_USE_SYNC_RULES_ FOR_RETPL')  if(checkOption == 'Y'    checkOption == 'y') {return true;} else {return false;}</pre>
Sync Rule	Detail	ORACO Duplicate Layout	Any	
Sync Rule	Detail	ORACO RETPL Layout	Any	<pre>def checkOption =oracle.apps.fnd.applcore.Pro ACO_USE_SYNC_RULES_ FOR_RETPL')  if(checkOption == 'Y'    checkOption == 'y') {return true;} else {return false;}</pre>
Sync Rule	Search and Select Dialog	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Print Template	Landing Page	ORACO Duplicate Layout	Any	
Print Template	Create	ORACO Duplicate Layout	Any	
Print Template	Detail	ORACO Duplicate Layout	Any	
Print Template	Detail	ORACO Duplicate Layout For Draft with AccClustr	Any	<pre> if( ( __ORACO__Status_c == null    __ORACO__Status_c == 'ORA_ACO_PRNT_TMPL_STATUS_D' ) &amp;&amp; ( __ORACO__TemplateType_c == 'ORA_ACO_PRINT_TMPL_TYPE_I'    __ORACO__TemplateType_c == 'ORA_ACO_PRINT_TMPL_TYPE_P'    __ORACO__TemplateType_c == 'ORA_ACO_PRINT_TMPL_TYPE_O' ) ){ return true; }else{ return false; } </pre>
Print Template	Detail	ORACO Duplicate Layout For Draft without AccClustr	Any	<pre> if( ( __ORACO__Status_c == null    __ORACO__Status_c == 'ORA_ACO_PRNT_TMPL_STATUS_D' ) &amp;&amp; ( __ORACO__TemplateType_c == 'ORA_ACO_PRINT_TMPL_TYPE_IA'    __ORACO__TemplateType_c == 'ORA_ACO_PRINT_TMPL_TYPE_C'    __ORACO__TemplateType_c == 'ORA_ACO_PRINT_TMPL_TYPE_RS'    __ORACO__TemplateType_c == 'ORA_ACO_PRINT_TMPL_TYPE_IR'    __ORACO__TemplateType_c == 'ORA_ACO_PRINT_TMPL_TYPE_IT' ) ){ return true; }else{ return false; } </pre>
Print Template	Detail	ORACO Duplicate Layout For Publish with AccClustr	Any	<pre> if( ( __ORACO__Status_c == 'ORA_ACO_PRNT_TMPL_STATUS_P' ) &amp;&amp; </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>( __ORACO__ TemplateType_c == 'ORA_ACO_PRINT_TMPL_ TYPE_I'    __ORACO__TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_P'    __ORACO__TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_O')){ return true; }else{ return false; }</pre>
Print Template	Detail	ORACO Duplicate Layout For Active with AccClustr	Any	<pre>if( ( __ORACO__Status_ c == 'ORA_ACO_PRNT_ TMPL_STATUS_A' ) &amp;&amp; ( __ORACO__TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_I'    __ORACO__TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_P'    __ORACO__TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_O')){ return true; }else{ return false; }</pre>
Print Template	Detail	ORACO Duplicate Layout For Active without AccClustr	Any	<pre>if( ( __ORACO__Status_ c == 'ORA_ACO_PRNT_ TMPL_STATUS_A' ) &amp;&amp; ( __ORACO__TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_IA'    __ORACO__TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_C'    __ORACO__TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_RS'    __ORACO__TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_IR'    __ORACO__TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_IT')){ return true; }else{ return false; }</pre>
Print Template	Detail	ORACO Duplicate Layout For Inactv with AccClustr	Any	<pre>if( ( __ORACO__Status_ c == 'ORA_ACO_PRNT_ TMPL_STATUS_I' ) &amp;&amp; ( __ORACO__ TemplateType_c ==</pre>



Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>'ORA_ACO_PRINT_TMPL_ TYPE_I'    _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_P'    _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_O'))){ return true; }else{ return false; }</pre>
Print Template	Detail	ORACO Duplicate Layout For Inactv without AccClustr	Any	<pre>if( (_ORACO_Status_ c == 'ORA_ACO_PRNT_ TMPL_STATUS_I' ) &amp;&amp; ( _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_IA'    _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_C'    _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_RS'    _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_IR'    _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_IT'))){ return true; }else{ return false; }</pre>
Print Template	Detail	ORACO Duplicate Layout For Revise with AccClustr	Any	<pre>if( ( _ORACO_Status_ c == 'ORA_ACO_PRNT_ TMPL_STATUS_R' ) &amp;&amp; ( _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_I'    _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_P'    _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_O'))){ return true; }else{ return false; }</pre>
Print Template	Detail	ORACO Duplicate Layout For Revise without AccClustr	Any	<pre>if( (_ORACO_Status_ c == 'ORA_ACO_PRNT_ TMPL_STATUS_R' ) &amp;&amp; ( _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_IA'   </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_C'    _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_RS'    _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_IR'    _ORACO_TemplateType_ c == 'ORA_ACO_PRINT_ TMPL_TYPE_IT')){ return true; }else{ return false; } </pre>
Print Template	Detail	ORACO Duplicate Layout For Schedule with AccClustr	Any	<pre> if (_ORACO_Status_ c == 'ORA_ACO_PRNT_ TMPL_STATUS_S') { return true; } </pre>
Print Template	Search and Select Dialog	ORACO Duplicate Layout	Any	
Template File	Landing Page	ORACO Duplicate Layout	Any	
Template File	Create	ORACO Duplicate Layout	Any	
Template File	Detail	ORACO Duplicate Layout	Any	
Template File	Search and Select Dialog	ORACO Duplicate Layout	Any	
Account Task Details	Landing Page	ORACO Duplicate Layout	Sales Administrator Custom Marketing Manager Custom	
Account Task Details	Create	ORACO Duplicate Layout	Sales Administrator Custom Marketing Manager Custom	
Account Task Details	Detail	ORACO Duplicate Layout	Sales Administrator Custom Marketing Manager Custom Sales Representative Custom	
Account Task Details	Search and Select Dialog	ORACO Duplicate Layout	Sales Administrator Custom Marketing Manager Custom	

Object	Page Layout	Layout Name	Role	Advanced Expression

## Direct Store Delivery Specific Layouts

In the common application, you must activate the direct store delivery specific layouts listed in the following table.

Object	Page Layout	Layout Name	Role	Advanced Expression
Coupon	Landing Page	ORACO Duplicate Layout	Any	
Coupon	Create	ORACO Duplicate Layout	Any	
Coupon	Detail	ORACO Duplicate Layout	Any	
Coupon	Search and Select Dialog	ORACO Duplicate Layout	Any	
Coupon Settlement	Landing Page	ORACO Duplicate Layout	Any	
Coupon Settlement	Create	ORACO Duplicate Layout	Any	
Coupon Settlement	Detail	ORACO Duplicate Layout	Any	
Coupon Settlement	Detail	ORACO Cashier Layout	Consumer Goods Cashier	<pre>if( __ORACO__ PresettleRprtNum_ Obj_c?.__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_OPEN') return true</pre>
Coupon Settlement	Detail	ORACO Cashier Closed Layout	Consumer Goods Cashier	<pre>if( __ORACO__ PresettleRprtNum_ Obj_c?.__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_CLOSED') return true</pre>
Coupon Settlement	Detail	ORACO Administrator Closed Layout	Sales Administrator Custom	<pre>if( __ORACO__ PresettleRprtNum_ Obj_c?.__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_CLOSED')</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<code>return true</code>
Coupon Settlement	Search and Select Dialog	ORACO Duplicate Layout	Any	
Credit Line	Landing Page	ORACO Duplicate Layout	Any	
Credit Line	Create	ORACO Duplicate Layout	Any	
Credit Line	Detail	ORACO Duplicate Layout	Any	
Credit Line	Search and Select Dialog	ORACO Duplicate Layout	Any	
Credit Note	Landing Page	ORACO Duplicate Layout	Any	
Credit Note	Create	ORACO Duplicate Layout	Any	
Credit Note	Detail	ORACO Duplicate Layout	Any	
Credit Note	Search and Select Dialog	ORACO Duplicate Layout	Any	
Distribution Center	Landing Page	ORACO Duplicate Layout	Any	
Distribution Center	Create	ORACO Duplicate Layout	Any	
Distribution Center	Detail	ORACO Duplicate Layout	Any	
Distribution Center	Search and Select Dialog	ORACO Duplicate Layout	Any	
Document	Landing Page	ORACO Duplicate Layout	Any	
Document	Create	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Document	Detail	ORACO Duplicate Layout	Any	
Document	Detail	ORACO Cashier Layout	Consumer Goods Cashier	<pre>if(__ORACO__ PresettleRprtNum_ Obj_c?.__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_OPEN')  return true</pre>
Document	Detail	ORACO Cashier Closed Layout	Consumer Goods Cashier	<pre>if(__ORACO__ PresettleRprtNum_ Obj_c?.__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_CLOSED')  return true</pre>
Document	Detail	ORACO Administrator Closed Layout	Sales Administrator Custom	<pre>if(__ORACO__ PresettleRprtNum_ Obj_c?.__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_CLOSED')  return true</pre>
Document	Search and Select Dialog	ORACO Duplicate Layout	Any	
Expense	Landing Page	ORACO Duplicate Layout	Any	
Expense	Create	ORACO Duplicate Layout	Any	
Expense	Detail	ORACO Duplicate Layout	Any	
Expense	Detail	ORACO Cashier Layout	Consumer Goods Cashier	<pre>if(__ORACO__ PresettleRprtNum_ Obj_c?.__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_OPEN')  return true</pre>
Expense	Detail	ORACO Cashier Closed Layout	Consumer Goods Cashier	<pre>if(__ORACO__ PresettleRprtNum_ Obj_c?.__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_CLOSED')  return true</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<code>return true</code>
Expense	Detail	ORACO Administrator Closed Layout	Sales Administrator Custom	<code>if(__ORACO__ PreSettleRprtNum_ Obj_c?.__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_CLOSED')  return true</code>
Expense	Search and Select Dialog	ORACO Duplicate Layout	Any	
Inventory	Landing Page	ORACO DSD Duplicate Layout	Any	
Inventory	Create	ORACO DSD Duplicate Layout	Any	
Inventory	Detail	ORACO DSD Duplicate Layout	Any	
Inventory	Search and Select Dialog	ORACO DSD Duplicate Layout	Any	
Inventory Audit Line	Landing Page	ORACO Duplicate Layout	Any	
Inventory Audit Line	Create	ORACO Duplicate Layout	Any	
Inventory Audit Line	Detail	ORACO Duplicate Layout	Any	
Inventory Audit Line	Search and Select Dialog	ORACO Duplicate Layout	Any	
Inventory Audit Report	Landing Page	ORACO Duplicate Layout	Any	
Inventory Audit Report	Create	ORACO Duplicate Layout	Any	
Inventory Audit Report	Detail	ORACO Duplicate Layout	Any	
Inventory Audit Report	Search and Select Dialog	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Inventory Reload Line	Landing Page	ORACO Duplicate Layout	Any	
Inventory Reload Line	Create	ORACO Duplicate Layout	Any	
Inventory Reload Line	Detail	ORACO Duplicate Layout	Any	
Inventory Reload Line	Search and Select Dialog	ORACO Duplicate Layout	Any	
Inventory Reload Report	Landing Page	ORACO Duplicate Layout	Any	
Inventory Reload Report	Create	ORACO Duplicate Layout	Any	
Inventory Reload Report	Detail	ORACO Duplicate Layout	Any	
Inventory Reload Report	Search and Select Dialog	ORACO Duplicate Layout	Any	
Invoice	Landing Page	ORACO Duplicate Layout	Any	
Invoice	Create	ORACO Duplicate Layout	Any	
Invoice	Detail	ORACO Duplicate Layout	Any	
Invoice	Search and Select Dialog	ORACO Duplicate Layout	Any	
Invoice Line	Landing Page	ORACO Duplicate Layout	Any	
Invoice Line	Create	ORACO Duplicate Layout	Any	
Invoice Line	Detail	ORACO Duplicate Layout	Any	
Invoice Line	Search and Select Dialog	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Legal Entity	Landing Page	ORACO Duplicate Layout	Any	
Legal Entity	Create	ORACO Duplicate Layout	Any	
Legal Entity	Detail	ORACO Duplicate Layout	Any	
Legal Entity	Search and Select Dialog	ORACO Duplicate Layout	Any	
Order Line Request	Landing Page	ORACO Duplicate Layout	Any	
Order Line Request	Create	ORACO Duplicate Layout	Any	
Order Line Request	Detail	ORACO Duplicate Layout	Any	
Order Line Request	Search and Select Dialog	ORACO Duplicate Layout	Any	
Order Line Rollup	Landing Page	ORACO Duplicate Layout	Any	
Order Line Rollup	Create	ORACO Duplicate Layout	Any	
Order Line Rollup	Detail	ORACO Duplicate Layout	Any	
Order Line Rollup	Detail	ORACO Returned Layout	Any	<pre>def orderType = __ ORACO__Order_Obj_c?._ ORACO__OrderType_ c;if(orderType == 'ORA_ACO_ORDER_ TYPE_RETURN'){ return true;return false;</pre>
Order Line Rollup	Search and Select Dialogue	ORACO Duplicate Layout	Any	
Order Line Status	Landing Page	ORACO Duplicate Layout	Any	



Object	Page Layout	Layout Name	Role	Advanced Expression
Order Line Status	Create	ORACO Duplicate Layout	Any	
Order Line Status	Detail	ORACO Duplicate Layout	Any	
Order Line Status	Search and Select Dialog	ORACO Duplicate Layout	Any	
Order Request	Landing Page	ORACO Duplicate Layout	Any	
Order Request	Create	ORACO Duplicate Layout	Any	
Order Request	Detail	ORACO Duplicate Layout	Any	
Order Request	Detail	ORACO Duplicate Layout	Any	
Order Request	Detail	ORACO Duplicate Layout	Any	
Order Request	Search and Select Dialogue	ORACO Duplicate Layout	Any	
Order Rollup	Landing Page	ORACO Duplicate Layout	Any	
Order Rollup	Create	ORACO Duplicate Layout	Any	
Order Rollup	Detail	ORACO Duplicate Layout	Any	
Order Rollup	Detail	ORACO Open Layout	Any	<pre>if(__ORACO__ LastRequestStatus_c == 'ORA_ACO_ORDER_ STATUS_OPEN'){ return true }else{ return false }</pre>
Order Rollup	Detail	ORACO Submitted Layout	Any	<pre>if (__ORACO__ LastRequestStatus_c == 'ORA_ACO_ORDER_ STATUS_SUBMITTED'    __ORACO__ LastRequestStatus_c</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> == 'ORA_ACO_ORDER_ STATUS_BOOKED'    __ORACO__ LastRequestStatus_c == 'ORA_ACO_ORDER_ STATUS_UPDATED'    __ORACO__ LastRequestStatus_c == 'ORA_ACO_ORDER_ STATUS_UPDATEREQ'    __ORACO__ LastRequestStatus_ c == 'ORA_ACO_ ORDER_STATUS_ UPDATEREJ' ) { return true }else{ return false } </pre>
Order Rollup	Detail	ORACO Terminal Layout	Any	<pre> if ( __ORACO__ LastRequestStatus_c == 'ORA_ACO_ORDER_ STATUS_BOOKREJ'    __ORACO__ LastRequestStatus_c == 'ORA_ACO_ORDER_ STATUS_CANCELREQ'    __ORACO__ LastRequestStatus_c == 'ORA_ACO_ORDER_ STATUS_CANCELED'    __ORACO__ LastRequestStatus_c == 'ORA_ACO_ORDER_ STATUS_CANCELREJ'    __ORACO__ LastRequestStatus_c == 'ORA_ACO_ORDER_ STATUS_PARTIAL'    __ORACO__ LastRequestStatus_ c == 'ORA_ACO_ ORDER_STATUS_ DELIVERED' ) { return true }else{ return false } </pre>
Order Rollup	Detail	ORACO Return Order Layout	Any	<pre> if( __ORACO__ OrderType_c == 'ORA_ ACO_ORDER_TYPE_ RETURN' ){ return true }else{ return false } </pre>
Order Rollup	Search and Select Dialogue	ORACO Duplicate Layout	Any	
Order Status	Landing Page	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Order Status	Create	ORACO Duplicate Layout	Any	
Order Status	Detail	ORACO Duplicate Layout	Any	
Order Status	Search and Select Dialog	ORACO Duplicate Layout	Any	
Payment	Landing Page	ORACO Duplicate Layout	Any	
Payment	Landing Page	ORACO Sales Administrator Layout	Sales Administrator	
Payment	Landing Page	ORACO Cashier layout	Consumer Goods Cashier	
Payment	Create	ORACO Duplicate Layout	Any	
Payment	Detail	ORACO Duplicate Layout	Any	
Payment	Detail	ORACO Sales Administrator Layout	Sales Administrator	
Payment	Detail	ORACO Cashier Layout	Consumer Goods Cashier	
Payment	Search and Select Dialog	ORACO Duplicate Layout	Any	
Payment Line	Landing Page	ORACO Duplicate Layout	Any	
Payment Line	Landing Page	ORACO Sales Administrator Layout	Sales Administrator	
Payment Line	Create	ORACO Duplicate Layout	Any	
Payment Line	Create	ORACO Sales Administrator Layout	Sales Administrator	
Payment Line	Detail	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Payment Line	Detail	ORACO Sales Administrator Layout	Sales Administrator	
Payment Line	Detail	ORACO Cashier Layout	Consumer Goods Cashier	
Payment Line	Search and Select Dialog	ORACO Duplicate Layout	Any	
Assortment	Landing Page	ORACO Duplicate Layout	Any	
Assortment	Create	ORACO Duplicate Layout	Any	
Assortment	Detail	ORACO AM Duplicate Layout	Account Manager Custom	<pre>def secCtx =   adf.context.getSecurityContext() if   (secCtx.getUserName() !=   CreatedBy)   return true; else   return false;</pre>
Assortment	Detail	ORACO Duplicate Layout	Any	
Assortment	Detail	ORACO Duplicate Layout Doc Cloud		<pre>def isDocCloudEnabled   =oracle.apps.fnd.applcore.Pro   _ORACO__USE_DOC_CLOUD_   FOR_ASSORTMENT_PLAN'); if((isDocCloudEnabled   == 'Y'      isDocCloudEnabled ==   'y') ){   return true; } else{   return false; }</pre>
Assortment	Detail	ORACO Duplicate Layout Doc Cloud Plan		<pre>def isDocCloudEnabled   =oracle.apps.fnd.applcore.Pro   _ORACO__USE_DOC_CLOUD_   FOR_ASSORTMENT_PLAN'); def planExists = __   ORACO__PlanCCFolderId_   c if((isDocCloudEnabled   == 'Y'      isDocCloudEnabled ==   'y') &amp;&amp; (planExists !=   null &amp;&amp; planExists !=   '')){   return true;</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> } else{ return false; } </pre>
Assortment	Search and Select Dialog	ORACO Duplicate Layout	Any	
Assortment Line	Landing Page	ORACO Duplicate Layout	Any	
Assortment Line	Create	ORACO Duplicate Layout	Any	
Assortment Line	Detail	ORACO Non Administrator Layout		
Assortment Line	Detail	ORACO Duplicate Layout	Sales Administrator Custom Account Manager Custom	
Assortment Line	Detail	ORACO Duplicate Layout Doc Cloud Plan	Any	<pre> def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro ORACO_USE_DOC_CLOUD FOR_ASSORTMENT_PLAN'); def planExists = __ ORACO_PlanCCFolderId_ c if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (planExists ! = null &amp;&amp; planExists ! = '')){ return true; } else{ return false; } </pre>
Assortment Line	Search and Select Dialog	ORACO Duplicate Layout	Any	
Route	Landing Page	ORACO Duplicate Layout	Any	
Route	Create	ORACO Duplicate Layout	Any	
Route	Detail	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Route	Detail	ORACO Duplicate Layout for Non SA	Custom Objects Administration Account Manager Custom Sales Manager Custom Marketing Manager Custom Sales Representative Custom	
Route	Detail	ORACO Duplicate Layout for Cashier	Consumer Goods Cashier	
Route	Search and Select Dialog	ORACO Duplicate Layout	Any	
Route Allocation	Landing Page	ORACO Duplicate Layout	Any	
Route Allocation	Create	ORACO Duplicate Layout	Any	
Route Allocation	Detail	ORACO Duplicate Layout	Any	
Route Allocation	Search and Select Dialog	ORACO Duplicate Layout	Any	
Route Assignment History	Landing Page	ORACO Duplicate Layout	Any	
Route Assignment History	Create	ORACO Duplicate Layout	Any	
Route Assignment History	Detail	ORACO Duplicate Layout	Any	
Route Assignment History	Search and Select Dialog	ORACO Duplicate Layout	Any	
Route Check In History	Landing Page	ORACO Duplicate Layout	Any	
Route Check In History	Create	ORACO Duplicate Layout	Any	
Route Check In History	Detail	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Route Check In History	Search and Select Dialog	ORACO Duplicate Layout	Any	
Merchandising Material	Landing Page	ORACO Duplicate Layout	Any	
Merchandising Material	Create	ORACO Duplicate Layout	Any	
Merchandising Material	Detail	ORACO Duplicate Layout	Any	
Merchandising Material	Search and Select Dialog	ORACO Duplicate Layout	Any	
Merchandising Material Allocation	Landing Page	ORACO Duplicate Layout	Any	
Merchandising Material Allocation	Create	ORACO Duplicate Layout	Any	
Merchandising Material Allocation	Detail	ORACO Duplicate Layout	Any	
Merchandising Material Allocation	Search and Select Dialog	ORACO Duplicate Layout	Any	
Route Inventory	Landing Page	ORACO Duplicate Layout	Any	
Route Inventory	Create	ORACO Duplicate Layout	Any	
Route Inventory	Detail	ORACO Duplicate Layout	Any	
Route Inventory	Search and Select Dialog	ORACO Duplicate Layout	Any	
Route Inventory Transaction	Landing Page	ORACO Duplicate Layout	Any	
Route Inventory Transaction	Create	ORACO Duplicate Layout	Any	
Route Inventory Transaction	Detail	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Route Inventory Transaction	Search and Select Dialog	ORACO Duplicate Layout	Any	
Route Settlement Report	Landing Page	ORACO Duplicate Layout	Any	
Route Settlement Report	Create	ORACO Duplicate Layout	Any	
Route Settlement Report	Detail	ORACO Duplicate Layout	Any	
Route Settlement Report	Detail	ORACO Cashier Layout	Consumer Goods Cashier	<pre>if(__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_OPEN') return true</pre>
Route Settlement Report	Detail	ORACO Cashier Closed Layout	Consumer Goods Cashier	<pre>if(__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_CLOSED') return true</pre>
Route Settlement Report	Detail	ORACO Administrator Layout	Sales Administrator Custom	<pre>if(__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_OPEN') return true</pre>
Route Settlement Report	Detail	ORACO Administrator Closed Layout	Sales Administrator Custom	<pre>if(__ORACO__ Status_c=='ORA_ACO_ SETTLEMENT_CLOSED') return true</pre>
Route Settlement Report	Detail	ORACO Cashier Closed Layout	Sales Representative Custom	
Route Settlement Report	Search and Select Dialog	ORACO Duplicate Layout	Any	
Shipment	Landing Page	ORACO Duplicate Layout	Any	
Shipment	Create	ORACO Duplicate Layout	Any	



Object	Page Layout	Layout Name	Role	Advanced Expression
Shipment	Detail	ORACO Duplicate Layout	Any	
Shipment	Search and Select Dialog	ORACO Duplicate Layout	Any	
Shipment Line	Landing Page	ORACO Duplicate Layout	Any	
Shipment Line	Create	ORACO Duplicate Layout	Any	
Shipment Line	Detail	ORACO Duplicate Layout	Any	
Shipment Line	Search and Select Dialog	ORACO Duplicate Layout	Any	
Shopping Cart Template	Landing Page	ORACO Duplicate Layout	Any	
Shopping Cart Template	Create	ORACO Duplicate Layout	Any	
Shopping Cart Template	Detail	ORACO Duplicate Layout	Any	
Shopping Cart Template	Search and Select Dialog	ORACO Duplicate Layout	Any	
Survey Template	Landing Page	ORACO Duplicate Layout	Any	
Survey Template	Create	ORACO Duplicate Layout	Any	
Survey Template	Detail	ORACO Duplicate Layout	Any	
Survey Template	Detail	ORACO Scheduled Layout	Any	<pre>if (__ORACO__Status_c == 'ORA_ACO_SURVEY_TPL_ST_SCHED'){ return true; }</pre>
Survey Template	Search and Select Dialog	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Account	Create	ORACO Telesales Duplicate Layout	Any	
Account	Create	ORACO Telesales Duplicate Layout for Sales Administrator	Sales Administrator Custom	
Account	Detail	ORACO Telesales Duplicate Layout	Any	
Account	Detail	ORACO Telesales Rep Manager Layout	Sales Representative Custom Sales Manager Custom	
Account	Detail	ORACOC Telesales Representative Layout	Sales Representative Custom	
Account	Detail	ORACO Telesales Marketing Manager Layout	Marketing Manager Custom	
Account	Detail	ORACO Telesales Account Manager Layout	Account Manager Custom Sales Administrator Custom	
Account	Detail	ORACO Telesales Administrator Layout	Sales Administrator Custom	
Bank Account	Detail	ORACO Duplicate Layout	Any	
Bank Account	Search and Select Dialog	ORACO Duplicate Layout	Any	
Combo Group	Landing Page	ORACO Duplicate Layout	Any	
Combo Group	Create	ORACO Duplicate Layout	Any	
Combo Group	Detail Page	ORACO Duplicate Layout	Any	
Combo Group	Search and Select Dialog	ORACO Duplicate Layout	Any	
Shopping Cart	Landing Page	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Shopping Cart	Create	ORACO Duplicate Layout	Any	
Shopping Cart	Detail Page	ORACO Duplicate Layout	Any	<pre>def   isAssortPickerEnabled   =oracle.apps.fnd.applcore.Pro   _ORACO_SWITCH_TO_   ASSORTMENT_PICKER');   if(isAssortPickerEnabled   == 'Y'      isAssortPickerEnabled   == 'y'){ return   true; } else{ return   false; }</pre>
Shopping Cart	Detail Page	ORACO Product Picker Layout	Any	
Shopping Cart	Detail Page	ORACO Order Edit Layout	Any	<pre>if( _ORACO_OrderType_ c == 'ORA_ACO_EDIT_ ORDER') return true else return false</pre>
Shopping Cart	Detail Page	ORACO Order Edit Layout with Assortment Picker	Any	<pre>def   isAssortPickerEnabled   =oracle.apps.fnd.applcore.Pro   _ORACO_SWITCH_TO_   ASSORTMENT_PICKER');   def isEditOrder   =false if( _ORACO_   OrderType_c == 'ORA_   ACO_EDIT_ORDER')   isEditOrder= true;    if((isAssortPickerEnabled   == 'Y'      isAssortPickerEnabled   == 'y') &amp;&amp;   isEditOrder ){ return   true; } else{ return   false; }</pre>
Shopping Cart	Search and Select Dialog	ORACO Duplicate Layout	Any	
Object Configuration	Landing Page	ORACO Duplicate Layout	Any	
Object Configuration	Create	ORACO Duplicate Layout	Any	
Object Configuration	Detail	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Object Configuration	Search and Select Dialog	ORACO Duplicate Layout	Any	
Container Class	Landing Page	ORACO Duplicate Layout	Any	
Container Class	Create	ORACO Duplicate Layout	Any	
Container Class	Detail	ORACO Duplicate Layout	Any	
Container Class	Search and Select Dialog	ORACO Duplicate Layout	Any	
Account Container Class	Create	ORACO Duplicate Layout	Any	
Account Container Class	Detail	ORACO Duplicate Layout	Any	
Assortment Line Relationship	Landing Page	ORACO Duplicate Layout	Any	
Assortment Line Relationship	Create	ORACO Duplicate Layout	Any	
Assortment Line Relationship	Detail	ORACO Duplicate Layout	Any	
Assortment Line Relationship	Search and Select Dialog	ORACO Duplicate Layout	Any	
Bank Deposit	Landing Page	ORACO Duplicate Layout	Any	
Bank Deposit	Create	ORACO Duplicate Layout	Any	
Bank Deposit	Detail	ORACO Duplicate Layout	Any	
Bank Deposit	Detail	ORACO Closed Layout	Sales Administrator Custom	if( __ORACO__ RouteSettlement_ Obj_c?. __ORACO__ Status_c=='ORA_ACO SETTLEMENT_CLOSED')

Object	Page Layout	Layout Name	Role	Advanced Expression
				<code>return true</code>
Bank Deposit	Search and Select Dialog	ORACO Duplicate Layout	Any	
Store Credit	Landing Page	ORACO Duplicate Layout	Any	
Store Credit	Create	ORACO Duplicate Layout	Any	
Store Credit	Detail	ORACO Duplicate Layout	Any	
Store Credit	Search and Select Dialog	ORACO Duplicate Layout	Any	
Store Credit Transaction	Landing Page	ORACO Duplicate Layout	Any	
Store Credit Transaction	Create	ORACO Duplicate Layout	Sales Administrator Custom Sales Manager Custom Sales Representative Custom Account Manager Custom	
Store Credit Transaction	Detail	ORACO Duplicate Layout	Sales Administrator Custom Sales Manager Custom Sales Representative Custom Account Manager Custom	
Store Credit Transaction	Search and Select Dialog	ORACO Duplicate Layout	Any	
Merchandising	Landing Page	ORACO Duplicate Layout	Any	
Merchandising	Create	ORACO Duplicate Layout	Any	
Merchandising	Detail	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Assortment Plan	Create	ORACO Duplicate Layout	Any	
Assortment Plan	Detail	ORACO Duplicate Layout for Revised Plan	Any	if ( __ORACO__Status_c == 'ORA_ACO_ASSORT_PL_STAT_REV') { return true; }else{return false;}
Assortment Plan	Detail	ORACO Duplicate Layout for Inactive Plan	Any	if ( __ORACO__Status_c == 'ORA_ACO_ASSORT_PL_STAT_IN') { return true; }else{return false;}
Assortment Plan	Detail	ORACO Duplicate Layout for Active Plan	Any	if ( __ORACO__Status_c == 'ORA_ACO_ASSORT_PL_STAT_ACT') { return true; }else{return false;}
Assortment Plan	Detail	ORACO Duplicate Layout for Published Plan	Any	if ( __ORACO__Status_c == 'ORA_ACO_ASSORT_PL_STAT_PUB') { return true; }else{return false;}
Assortment Plan	Detail	ORACO Duplicate Layout for Draft Plan	Any	if ( __ORACO__Status_c == 'ORA_ACO_ASSORT_PL_STAT_DFT'){return true;}else{return false;}
Assortment Plan	Detail	ORACO Duplicate Layout CEC	Any	def isDocCloudEnabled =oracle.apps.fnd.applcore.Proc __ORACO__USE_DOC_CLOUD_FOR_ASSORTMENT_PLAN'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y')){ return true; } else{ return false; }
Assortment Plan	Detail	ORACO Duplicate for Scheduled Plan CEC	Any	def isDocCloudEnabled =oracle.apps.fnd.applcore.Proc __ORACO__USE_DOC_CLOUD_FOR_ASSORTMENT_PLAN'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') && ( __ORACO__

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>Status_c == 'ORA_ACO_ ASSORT_PL_STAT_SCH')){ return true; } else{ return false; }</pre>
Assortment Plan	Detail	ORACO Duplicate Layout For Draft Plan CEC	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO_USE_DOC_CLOUD_ FOR_ASSORTMENT_PLAN'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (_ORACO_ Status_c == 'ORA_ACO_ ASSORT_PL_STAT_DFT')){ return true; } else{ return false; }</pre>
Assortment Plan	Detail	ORACO Duplicate Layout for Published Plan CEC	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO_USE_DOC_CLOUD_ FOR_ASSORTMENT_PLAN'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (_ORACO_ Status_c == 'ORA_ACO_ ASSORT_PL_STAT_PUB')){ return true; } else{ return false; }</pre>
Assortment Plan	Detail	ORACO Duplicate Layout for Revised Plan CEC	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO_USE_DOC_CLOUD_ FOR_ASSORTMENT_PLAN'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (_ORACO_ Status_c == 'ORA_ACO_ ASSORT_PL_STAT_REV')){ return true; } else{ return false; }</pre>
Assortment Plan	Detail	ORACO Duplicate Layout for Active Plan CEC	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO_USE_DOC_CLOUD_ FOR_ASSORTMENT_PLAN');</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (__ORACO__ Status_c == 'ORA_ACO__ ASSORT_PL_STAT_ACT')){ return true; } else{ return false; } </pre>
Assortment Plan	Detail	ORACO Duplicate for Scheduled Plan	Any	<pre> if (__ORACO__Status_c == 'ORA_ACO__ASSORT_PL_STAT_SCH'){ return true; } </pre>
Assortment Plan	Search and Select Dialog	ORACO Duplicate Layout	Any	
Assortment Plan	Search and Select Dialog	ORACO Duplicate Layout for Inactive Plan CEC	Any	<pre> def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro __ORACO__USE_DOC_CLOUD__ FOR_ASSORTMENT_PLAN'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (__ORACO__ Status_c == 'ORA_ACO__ ASSORT_PL_STAT_IN')){ return true; } else{ return false; } </pre>
Cluster	Landing Page	ORACO Duplicate Layout	Any	
Cluster	Create	ORACO Duplicate Layout	Any	
Cluster	Detail	ORACO Active Layout	Any	<pre> if(__ORACO__Status_c == "ORA_ACO__CLUSTER_STATUS_ACTIVE") return true; </pre>
Cluster	Detail	ORACO Draft Layout	Any	
Cluster	Search and Select Dialog	ORACO Duplicate Layout	Any	
Promotion Program	Landing Page	ORACO Duplicate Layout		



Object	Page Layout	Layout Name	Role	Advanced Expression
Promotion Program	Create	ORACO Duplicate Layout	Any	
Promotion Program	Detail	ORACO Duplicate Layout	Any	
Promotion Program	Detail	Approved Layout	Any	<code>if(__ORACO__Status_c=='ORA_ACO_PROMO_PROG_APPROVED') return true</code>
Promotion Program	Detail	ORACO Scheduled Layout	Any	<code>if (__ORACO__Status_c == 'ORA_ACO_PROMO_PROG_SCHEDULED') { return true; }</code>
Promotion Program	Detail	Marketing Manager Draft Layout	Marketing Manager Custom	<code>if(__ORACO__Status_c=='ORA_ACO_PROMO_PROG_DRAFT') return true</code>
Promotion Program	Search and Select Dialog	ORACO Duplicate Layout	Any	
Shipment	Detail	ORACO Duplicate Layout	Any	
KPI Library	Landing Page	ORACO Duplicate Layout		
KPI Library	Create	ORACO Duplicate Layout	Any	
KPI Library	Detail	ORACO Duplicate Layout	Any	
KPI Library	Detail	ORACO Active Layout	Any	<code>if(__ORACO__Status_c=='ORA_ACO_KPI_LIB_STATUS_ACTIVE'){ return true; }</code>
KPI Library	Search and Select Dialog	ORACO Duplicate Layout	Any	
KPI Relationship	Landing Page	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
KPI Relationship	Create	ORACO Duplicate Layout	Any	
KPI Relationship	Detail	ORACO Duplicate Layout	Any	
KPI Relationship	Detail	ORACO ObjectiveKPI Layout	Any	<code>if( __ORACO__Objective_c != null){ return true; }</code>
KPI Relationship	Detail	ORACO Draft Layout	Any	<code>if( __ORACO__Account_c != null &amp;&amp; __ORACO__Status_c == 'ORA_ACO_KPI_DRAFT'){ return true; }</code>
KPI Relationship	Detail	ORACO Approved Layout	Any	<code>if( __ORACO__Account_c != null &amp;&amp; __ORACO__Status_c == 'ORA_ACO_KPI_APPROVED'){ return true; }</code>
KPI Relationship	Detail	ORACO Rejected Layout	Any	<code>if( __ORACO__Account_c != null &amp;&amp; __ORACO__Status_c == 'ORA_ACO_KPI_REJECTED'){ return true; }</code>
KPI Relationship	Detail	ORACO Completed Layout	Any	<code>if( __ORACO__Account_c != null &amp;&amp; __ORACO__Status_c == 'ORA_ACO_KPI_COMPLETED') { return true; }</code>
KPI Relationship	Detail	ORACO Canceled Layout	Any	<code>if( __ORACO__Account_c != null &amp;&amp; __ORACO__Status_c == 'ORA_ACO_KPI_CANCELED'){ return true; }</code>
KPI Relationship	Search and Select Dialog	ORACO Duplicate Layout	Any	
Team	Landing Page	ORACO Duplicate Layout		
Team	Create	ORACO Duplicate Layout	Any	
Team	Detail	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Team	Search and Select Dialog	ORACO Duplicate Layout	Any	
Merchandising Location	Detail	ORACO Doc Cloud Layout	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO_USE_DOC_CLOUD_ FOR_MERCHANDISING_ DISPLAY'); if(isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y'){ return true; } else{ return false; }</pre>
Merchandising Location	Detail	ORACO Plan Doc Cloud Layout	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO_USE_DOC_CLOUD_ FOR_MERCHANDISING_ DISPLAY'); def planExists = __ ORACO_MerchLocPlan_ Id_c if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (planExists ! = null &amp;&amp; planExists ! = '')){ return true; } else{ return false; }</pre>
Merchandising Location Plan	Landing Page	ORACO Duplicate Layout	Any	
Merchandising Location Plan	Create	ORACO Duplicate Layout	Any	
Merchandising Location Plan	Detail	ORACO Duplicate Layout	Any	
Merchandising Location Plan	Detail	ORACO Duplicate Layout for Inactive Plan	Any	<pre>if(_ORACO_Status_c == 'ORA_ACO_MERCH_ LOC_PL_STAT_I') { return true; } else { return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout for Active Plan	Any	<pre>if(_ORACO_Status_c == 'ORA_ACO_MERCH_ LOC_PL_STAT_A')</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>{ return true; } else { return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout for Revised Plan	Any	<pre>if(__ORACO__Status_c == 'ORA_ACO_MERCH_ LOC_PL_STAT_R') { return true; } else { return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout for Published Plan	Any	<pre>if(__ORACO__Status_c == 'ORA_ACO_MERCH_ LOC_PL_STAT_P') { return true; } else { return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout for Draft Plan	Any	<pre>if(__ORACO__Status_c == 'ORA_ACO_MERCH_ LOC_PL_STAT_D') { return true; } else { return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout CEC	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO__USE_DOC_CLOUD_ FOR_MERCHANDISING_ DISPLAY'); if(isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y'){ return true; } else{ return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout for Scheduled Plan CEC	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO__USE_DOC_CLOUD_ FOR_MERCHANDISING_ DISPLAY'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (__ORACO__ Status_c == 'ORA_ACO_ MERCH_LOC_PL_STAT_S')) { return true; } else{ return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout For Draft Plan CEC	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO__USE_DOC_CLOUD_</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>FOR_MERCHANDISING_ DISPLAY'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (__ORACO__ Status_c == 'ORA_ACO_ MERCH_LOC_PL_STAT_D')) { return true; } else{ return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout for Published Plan CEC	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO__USE_DOC_CLOUD_ FOR_MERCHANDISING_ DISPLAY'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (__ORACO__ Status_c == 'ORA_ACO_ MERCH_LOC_PL_STAT_P')) { return true; } else{ return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout for Active Plan	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO__USE_DOC_CLOUD_ FOR_MERCHANDISING_ DISPLAY'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (__ORACO__ Status_c == 'ORA_ACO_ MERCH_LOC_PL_STAT_R')) { return true; } else{ return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout for Active Plan CEC	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO__USE_DOC_CLOUD_ FOR_MERCHANDISING_ DISPLAY'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (__ORACO__</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>Status_c == 'ORA_ACO_MERCH_LOC_PL_STAT_A')) { return true; } else{ return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout for Inactive Plan CEC	Any	<pre>def isDocCloudEnabled =oracle.apps.fnd.applcore.Pro _ORACO_USE_DOC_CLOUD_FOR_MERCHANDISING_DISPLAY'); if((isDocCloudEnabled == 'Y'    isDocCloudEnabled == 'y') &amp;&amp; (__ORACO_Status_c == 'ORA_ACO_MERCH_LOC_PL_STAT_I')) { return true; } else{ return false; }</pre>
Merchandising Location Plan	Detail	ORACO Duplicate Layout for Schedule Plan CEC	Any	<pre>if (__ORACO_Status_c == 'ORA_ACO_MERCH_LOC_PL_STAT_S') { return true; }</pre>
Merchandising Location Plan	Search and Select Dialog	ORACO Duplicate Layout	Any	
Inventory	Create	ORACO DSD Display Plan Layout	Any	<pre>if (__ORACO_MerchLocPlan_Obj_c != null ){ return true; } else{ return false; }</pre>
Inventory	Detail	ORACO DSD Display Plan Layout	Any	<pre>if (__ORACO_MerchLocPlan_Obj_c != null ){ return true; } else{ return false; }</pre>
Object Mapping	Landing Page	ORACO Duplicate Layout	Any	
Object Mapping	Create	ORACO Duplicate Layout	Any	
Object Mapping	Detail	ORACO Duplicate Draft Layout	Any	<pre>if (__ORACO_Status_c == 'ORA_ACO_CMAP_</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<code>STATUS_DRAFT'){ return true; }</code>
Object Mapping	Detail	ORACO Duplicate Active Layout	Any	<code>if ( __ORACO__Status_c == 'ORA_ACO_CMAP_STATUS_ACTIVE') { return true; }</code>
Object Mapping	Detail	ORACO Duplicate Inactive Layout	Any	<code>if ( __ORACO__Status_c == 'ORA_ACO_CMAP_STATUS_INACTIVE') { return true; }</code>
Object Mapping	Search and Select Dialog	ORACO Duplicate Layout	Any	
Attribute Mapping	Landing Page	ORACO Duplicate Layout	Any	
Attribute Mapping	Create	ORACO Duplicate Layout	Any	
Attribute Mapping	Detail	ORACO Duplicate Layout	Any	
Attribute Mapping	Search and Select Dialog	ORACO Duplicate Layout	Any	
Publish Log	Landing Page	ORACO Duplicate Layout	Any	
Publish Log	Create	ORACO Duplicate Layout	Any	
Publish Log	Detail	ORACO Duplicate Layout	Any	
Publish Log	Search and Select Dialog	ORACO Duplicate Layout	Any	
Assigned Assets	Landing Page	ORACO Duplicate Layout	Any	
Assigned Assets	Create	ORACO Duplicate Layout	Any	
Assigned Assets	Detail	ORACO Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Assigned Assets	Reusable Regions	ORACO Duplicate Layout	Any	
Shopping Cart Template Header	Landing Page	ORACO Duplicate Layout	Any	
Shopping Cart Template Header	Create	ORACO Duplicate Layout	Any	
Shopping Cart Template Header	Detail	ORACO Duplicate Layout	Any	
Shopping Cart Template Header	Search and Select Dialog	ORACO Duplicate Layout	Any	
Shopping Cart Template Plan	Landing Page	ORACO Duplicate Layout	Any	
Shopping Cart Template Plan	Create	ORACO Duplicate Layout	Any	
Shopping Cart Template Plan	Detail	ORACO Duplicate Draft Layout	Any	<pre>if(__ORACO__Status_c=='ORA_ACO_S_C_TMPL_STATUS_DRAFT'){ return true; }else{ return false; }</pre>
Shopping Cart Template Plan	Detail	ORACO Duplicate Active Layout	Any	<pre>if(__ORACO__Status_c=='ORA_ACO_S_C_TMPL_STATUS_ACTIVE'){ return true; }else{ return false; }</pre>
Shopping Cart Template Plan	Detail	ORACO Duplicate Inactive Layout	Any	<pre>if(__ORACO__Status_c=='ORA_ACO_S_C_TMPL_STATUS_INACT'){ return true; }else{ return false; }</pre>
Shopping Cart Template Plan	Detail	ORACO Duplicate Revised Layout	Any	<pre>if(__ORACO__Status_c=='ORA_ACO_S_C_TMPL_STATUS_REV'){ return true; }else{ return false; }</pre>
Shopping Cart Template Plan	Detail	ORACO Duplicate Published Layout	Any	<pre>if(__ORACO__Status_c=='ORA_ACO_S_C_TMPL_STATUS_PUB'){ return true; }else{ return false; }</pre>



In the Sales application, you must activate the direct store delivery specific layouts listed in the following table.

Object	Page Layout	Layout Name	Role	Advanced Expression
Promotion	Landing Page	Pricing ORACO Duplicate Layout	Any	
Promotion	Create	Pricing ORACO Duplicate Layout	Any	
Promotion	Create	Pricing ORACO FD Duplicate Layout	Any	<pre>if(__ORACO__ DiscountType_c == 'ORA_ACO_FD'    __ ORACO_DiscountType_c == null) return true</pre>
Promotion	Detail	Discount Model Layout for Volume Discount	Any	<pre>if(__ORACO__ DiscountType_c == 'ORA_ACO_VD') return true</pre>
Promotion	Detail	Discount Model Layout for Dynamic Combo	Any	<pre>if(__ORACO__ DiscountType_c == 'ORA_ACO_DC') return true</pre>
Promotion	Detail	Discount Model Layout for Fixed Combo	Any	<pre>if(__ORACO__ DiscountType_c == 'ORA_ACO_FC') return true</pre>
Promotion	Detail	Discount Model Layout for Fixed Discount	Any	<pre>if(__ORACO__ DiscountType_c == 'ORA_ACO_FD'    __ ORACO_DiscountType_c == null) return true</pre>
Promotion	Detail	Draft Layout for Volume Discount for AM	Account Manager Custom	<pre>if(__ORACO__Status_ c=='ORA_ACO_PROMOTION_ DRAFT' &amp;&amp; __ORACO__ _DiscountType_c == 'ORA_ACO_VD') return true</pre>
Promotion	Detail	Draft Layout for Dynamic Combo for AM	Account Manager Custom	<pre>if(__ORACO__Status_ c=='ORA_ACO_PROMOTION_ DRAFT' &amp;&amp; __ORACO__ _DiscountType_c == 'ORA_ACO_DC')return true</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
Promotion	Detail	Draft Layout for Fixed Combo for AM	Account Manager Custom	<pre>if(__ORACO__Status_c=='ORA_ACO_PROMOTION_DRAFT' &amp;&amp; __ORACO__DiscountType_c == 'ORA_ACO_FC')return true</pre>
Promotion	Detail	Draft Layout for Fixed Discount for AM	Account Manager Custom	<pre>if(__ORACO__Status_c=='ORA_ACO_PROMOTION_DRAFT' &amp;&amp; (__ORACO__DiscountType_c == 'ORA_ACO_FD'    __ORACO__DiscountType_c == null))return true</pre>
Activity	Appointment Details	DSD Before Check In Layout	Any	<pre>if(__ORACO__VisitStatusFCL_c=='ORA_ACO_VISIT_STATUS_NSTARTED'){return true}else{return false}</pre>
Activity	Appointment Details	DSD Sales Administrator and Manager Before Check In Layout	Custom Sales Administrator Custom Sales Manager	<pre>if(__ORACO__VisitStatusFCL_c=='ORA_ACO_VISIT_STATUS_NSTARTED'){return true}else{return false}</pre>
Activity	Appointment Details	DSD After Check In Layout	Any	<pre>if(__ORACO__VisitStatusFCL_c=='ORA_ACO_VISIT_STATUS_INPROGR'){return true}else{return false}</pre>
Activity	Appointment Details	DSD After Checkout Layout	Any	<pre>if(__ORACO__VisitStatusFCL_c=='ORA_ACO_VISIT_STATUS_COMPLETED'){return true}else{return false}</pre>
Activity	Appointment Details	DSD Not Serviced Layout	Any	<pre>if(__ORACO__VisitStatusFCL_c=='ORA_ACO_VISIT_STATUS_</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<code>NSERVICED') {return true} else {return false}</code>
Price Book Header	Landing Page	ORACO Duplicate Layout	Any	
Price Book Header	Create	ORACO Duplicate Layout	Any	
Price Book Header	Detail Page	ORACO Duplicate Layout	Any	
Price Book Header	Detail	ORACO Scheduled Layout	Any	<code>if ( __ORACO__Status_c == 'ORA_ACO_PRICE_BK_ST_SCHEDULE') { return true; }</code>
Store Visit Type	Detail	ORACO Duplicate Layout	Any	
Store Visit Type	Detail	ORACO Administrator and Manager Layout	Sales Administrator Custom Sales Manager Custom	
Store Visit Type	Detail	ORACO Sales Representative Layout	Sales Representative Custom	
Allocation Plan	Landing Page	ORACO Duplicate Layout	Any	
Allocation Plan	Create	ORACO Duplicate Layout Auto Alloc Plan	Any	<code>if( __ORACO__AllocMethod_c == 'ORA_ACO_MERCH_ALLOC_METH_SPLT'    __ORACO__AllocMethod_c == 'ORA_ACO_MERCH_ALLOC_METH_FILL') { return true; } else { return false; }</code>
Allocation Plan	Create	ORACO Duplicate Layout - Cust Alloc Plan	Any	<code>if( __ORACO__AllocMethod_c == null    __ORACO__AllocMethod_c == ''    __ORACO__AllocMethod_c == 'ORA_ACO_MERCH_ALLOC_METH_CUST') { return true; } else { return false; }</code>

Object	Page Layout	Layout Name	Role	Advanced Expression
				}
Allocation Plan	Detail	ORACO Duplicate Layout Auto Alloc Draft Plan	Any	<pre> if (__ORACO__Status_c == 'ORA_ACO_MERCH_ALLOC_PL_STAT_D' &amp;&amp; (__ORACO__AllocMethod_c == null    __ORACO__AllocMethod_c == 'ORA_ACO_MERCH_ALLOC_METH_FILL'    __ORACO__AllocMethod_c == 'ORA_ACO_MERCH_ALLOC_METH_SPLT')) { return true; }else{ return false; } </pre>
Allocation Plan	Detail	ORACO Duplicate Layout Cust Alloc Draft Plan	Any	<pre> if (__ORACO__Status_c == 'ORA_ACO_MERCH_ALLOC_PL_STAT_D' &amp;&amp; (__ORACO__AllocMethod_c == 'ORA_ACO_MERCH_ALLOC_METH_CUST')) { return true; }else{ return false; } </pre>
Allocation Plan	Detail	ORACO Duplicate Layout -Auto Alloc Publish Plan	Any	<pre> if (__ORACO__Status_c == 'ORA_ACO_MERCH_ALLOC_PL_STAT_P' &amp;&amp; (__ORACO__AllocMethod_c == 'ORA_ACO_MERCH_ALLOC_METH_FILL'    __ORACO__AllocMethod_c == 'ORA_ACO_MERCH_ALLOC_METH_SPLT')) { return true; }else{ return false; } </pre>
Allocation Plan	Detail	ORACO Duplicate Layout -Cust alloc Publish Plan	Any	<pre> if (__ORACO__Status_c == 'ORA_ACO_MERCH_ALLOC_PL_STAT_P' &amp;&amp; __ORACO__AllocMethod_c == 'ORA_ACO_MERCH_ALLOC_METH_CUST') { return true; }else{ return false; } </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
Allocation Plan	Detail	ORACO Duplicate Layout -Auto alloc Active Plan	Sales Administrator Custom Sales Manager Custom	<pre> if ( __ORACO__ Status_ c == 'ORA_ACO_MERCH_ ALLOC_PL_STAT_A' &amp;&amp; ( __ORACO__ AllocMethod_c == 'ORA_ ACO_MERCH_ALLOC_METH_ FILL'    __ORACO__ AllocMethod_c == 'ORA_ ACO_MERCH_ALLOC_METH_ SPLT')) { return true; }else{ return false; } </pre>
Allocation Plan	Detail	ORACO Duplicate Layout -Cust alloc Active Plan	Sales Administrator Custom Sales Manager Custom	<pre> if ( __ORACO__ Status_ c == 'ORA_ACO_MERCH_ ALLOC_PL_STAT_A' &amp;&amp; ( __ORACO__ AllocMethod_ c == 'ORA_ACO_MERCH_ ALLOC_METH_CUST')) { return true; }else{ return false; } </pre>
Allocation Plan	Detail	ORACO Duplicate Layout -Auto alloc Revise Plan	Sales Administrator Custom Sales Manager Custom	<pre> if ( __ORACO__ Status_ c == 'ORA_ACO_MERCH_ ALLOC_PL_STAT_R' &amp;&amp; ( __ORACO__ AllocMethod_c == 'ORA_ ACO_MERCH_ALLOC_METH_ FILL'    __ORACO__ AllocMethod_ c == 'ORA_ACO_MERCH_ ALLOC_METH_SPLT' )) { return true; }else{ return false; } </pre>
Allocation Plan	Detail	ORACO Duplicate Layout -Cust alloc Revise Plan	Sales Administrator Custom Sales Manager Custom  Sales Representative Custom	<pre> if ( __ORACO__ Status_ c == 'ORA_ACO_MERCH_ ALLOC_PL_STAT_R' &amp;&amp; ( __ORACO__ AllocMethod_c == 'ORA_ ACO_MERCH_ALLOC_METH_ CUST')) { return true; }else{ return false; } </pre>
Allocation Plan	Search and Select Dialog	ORACO Duplicate Layout	Sales Administrator Custom Sales Manager Custom	

**Note:** Follow the steps for each of the objects and provide values as specified in the table at the beginning of this section.

## Trade Promotion Management Specific Layouts

In the sales application, you must activate the trade promotion management specific layouts listed in the following table.

Object	Page Layout	Layout Name	Role	Advanced Expression
Accrual Rule	Landing Page	ORACO Duplicate Layout	Any	
Accrual Rule	Create	ORACO Duplicate Layout	Any	
Accrual Rule	Create	ORACO Cases Duplicate Layout	Any	<pre>if ( __ORACO__ Budget_ Obj_c?. __ORACO__ Basis_ c == "ORA_ACO_CASES") { return true; } return false;</pre>
Accrual Rule	Create	ORACO Revenue Duplicate Layout	Any	<pre>if ( __ORACO__ Budget_ Obj_c?. __ORACO__ Basis_c == "ORA_ACO_ REVENUE"){ return true; } return false;</pre>
Accrual Rule	Detail	ORACO Duplicate Layout	Any	
Accrual Rule	Detail	ORACO Cases Duplicate Layout	Any	<pre>if ( __ORACO__ Budget_ Obj_c?. __ORACO__ Basis_ c == "ORA_ACO_CASES") { return true; } return false;</pre>
Accrual Rule	Detail	ORACO Revenue Duplicate Layout	Any	<pre>if ( __ORACO__ Budget_ Obj_c?. __ORACO__ Basis_c == "ORA_ACO_ REVENUE"){ return true; } return false;</pre>
Budget	Landing Page	Oracle Duplicate Layout	Any	

Object	Page Layout	Layout Name	Role	Advanced Expression
Budget	Create	Oracle Duplicate Layout	Any	
Budget	Detail	Oracle Duplicate Layout	Any	
Budget	Search and Select Dialog	Oracle Duplicate Layout	Any	
Fund	Landing Page	ORACO Accrual Fund Layout	Any	
Fund Allocation	Landing Page	Oracle Duplicate Layout	Any	
Fund Allocation	Create	Oracle Duplicate Layout	Any	
Fund Allocation	Detail	Oracle Duplicate Layout	Any	
Fund Allocation	Search and Select Dialog	Oracle Duplicate Layout	Any	

In the common application, you must activate the trade promotion management specific layouts listed in the following table.

Object	Page Layout	Layout Name	Role	Advanced Expression
Claims	Landing Page	ORACO Duplicate Layout	Any	
Claims	Create	Partner Create Layout	<ul style="list-style-type: none"> <li>Partner Administrator Custom</li> <li>Partner Manager Custom</li> </ul>	
Claims	Create	Internal Create Layout	<ul style="list-style-type: none"> <li>Sales Representative Custom</li> <li>Sales Manager Custom</li> <li>Channel Operations Manager Custom</li> <li>Account Manager Custom</li> </ul>	

Object	Page Layout	Layout Name	Role	Advanced Expression
			<ul style="list-style-type: none"> <li>Sales Administrator Custom</li> </ul>	
Claims	Detail	Partner Draft Layout	Any	<pre>if('ORA_ACO_CLASTAT_DRAFT'.equalsIgnoreCase(_ORACO_Status_c)) return true; else return false;</pre>
Claims	Detail	Partner Draft Read Only Layout	Partner Manager Custom	<pre>if('ORA_ACO_CLASTAT_DRAFT'.equalsIgnoreCase(_ORACO_Status_c)) return true; else return false;</pre>
Claims	Detail	Partner Draft Layout for Assigned To	Partner Manager Custom	<pre>def resourceView = newView('Resource') resourceView.appendViewCriteria() = \${adf.util.getUserPartyId()} resourceView.executeQuery() def resProfileId=resourceView.find()  if('ORA_ACO_CLASTAT_DRAFT'.equalsIgnoreCase(_ORACO_Status_c) &amp;&amp; resProfileId == ORACO_AssignedTo_Id_c )  return true; else return false;</pre>
Claims	Detail	Internal Draft Layout	<ul style="list-style-type: none"> <li>Channel Operations Manager Custom</li> <li>Account Manager Custom</li> <li>Sales Administrator Custom</li> </ul>	<pre>if('ORA_ACO_CLASTAT_DRAFT'.equalsIgnoreCase(_ORACO_Status_c)) return true; else return false;</pre>
Claims	Detail	Internal Draft Read Only Layout	<ul style="list-style-type: none"> <li>Sales Manager</li> <li>Sales Representative</li> </ul>	<pre>if('ORA_ACO_CLASTAT_DRAFT'.equalsIgnoreCase(_ORACO_Status_c)) return true; else return false;</pre>
Claims	Detail	Internal Draft Layout for Assigned To	<ul style="list-style-type: none"> <li>Sales Manager</li> <li>Sales Representative</li> </ul>	<pre>def resourceView = newView('Resource') resourceView.appendViewCriteria() = \${adf.util.getUserPartyId()} resourceView.executeQuery()</pre>



Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>def resProfileId=resourceView.fin  if('ORA_ACO_CLASTAT_ DRAFT'.equalsIgnoreCase(_ _ORACO__Status_c) &amp;&amp; resProfileId == __ ORACO__AssignedTo_Id_ c )  return true; else return false;</pre>
Claims	Detail	Partner Non Draft Layout	<ul style="list-style-type: none"> <li>Partner Administrator Custom</li> <li>Partner Manager Custom</li> </ul>	<pre>if(!('ORA_ACO_CLASTAT_ DRAFT'.equalsIgnoreCase(_ _ORACO__Status_c))) return true; else return false;</pre>
Claims	Detail	Internal Non Draft Read Only Layout	<ul style="list-style-type: none"> <li>Sales Representative</li> <li>Sales Manager</li> <li>Channel Operations Manager Custom</li> <li>Account Manager Custom</li> <li>Sales Administrator Custom</li> </ul>	<pre>if(!('ORA_ACO_CLASTAT_ DRAFT'.equalsIgnoreCase(_ _ORACO__Status_c))) return true; else return false;</pre>
Claims	Detail	Internal Non Draft Layout	<ul style="list-style-type: none"> <li>Channel Operations Manager Custom</li> <li>Account Manager Custom</li> <li>Sales Administrator Custom</li> </ul>	<pre>if(!('ORA_ACO_CLASTAT_ DRAFT'.equalsIgnoreCase(_ _ORACO__Status_c) &amp;&amp; !'ORA_ACO_CLASTAT_ WITHDRAWN'.equalsIgnoreCase(_ _ORACO__Status_c)) return true; else return false;</pre>
Claims	Detail	Internal Submitted Layout	<ul style="list-style-type: none"> <li>Sales Administrator Custom</li> <li>Account Manger Custom</li> <li>Channel Operations Manager Custom</li> </ul>	<pre>if('ORA_ACO_CLASTAT_ SUBMITTED'.equalsIgnoreCase(_ _ORACO__Status_c))  return true; else return false;</pre>
Claims	Detail	Partner Submitted Layout	<ul style="list-style-type: none"> <li>Partner Administrator Custom</li> <li>Partner Sales Manager</li> </ul>	<pre>if('ORA_ACO_CLASTAT_ SUBMITTED'.equalsIgnoreCase(_ _ORACO__Status_c))  return true; else return false;</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
Claims	Detail	Resolved Closed Layout	Any	<pre> if(('ORA_ACO_CLASTAT_ RESOLVED'.equalsIgnoreCase(_ _ORACO_Status_c))   ('ORA_ACO_CLASTAT_ CLOSED'.equalsIgnoreCase(_ _ORACO_Status_c)))  return true; else return false; </pre>
Claim Item	Landing Page	ORACO Duplicate Layout	Any	
Claim Item	Create	ORACO Duplicate Layout	Any	
Claim Item	Detail	ORACO Duplicate Layout	Any	
Resolution	Landing Page	ORACO Duplicate Layout	Any	
Resolution	Create	ORACO Duplicate Layout	Any	
Resolution	Create	Funded Payment Layout	Any	<pre> if('ORA_ACO_RESTYP_ FUNDPAY'.equalsIgnoreCase(_ _ORACO_ ResolutionType_c)) { return true; } else { return false; } </pre>
Resolution	Detail	Claim Funded Draft Layout	Any	<pre> if(('ORA_ACO_RESTYP_ FUNDPAY'.equalsIgnoreCase(_ _ORACO_ ResolutionType_c)) &amp;&amp;('ORA_ACO_RESSTA_ DRAFT'.equalsIgnoreCase(_ _ORACO_Status_c)) &amp;&amp;('ORA_ACO_RESOBJ_ CLAIM'.equalsIgnoreCase(_ _ORACO_SourceObject_ c))) { return true; } else { return false; } </pre>
Resolution	Detail	Claim Funded Non Draft Layout	Any	<pre> if(('ORA_ACO_RESTYP_ FUNDPAY'.equalsIgnoreCase(_ _ORACO_ ResolutionType_c)) &amp;&amp;('ORA_ACO_RESSTA_ DRAFT'.equalsIgnoreCase(_ _ORACO_Status_c)) &amp;&amp;('ORA_ACO_RESOBJ_ </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre>CLAIM'.equalsIgnoreCase(_ _ORACO__SourceObject_ c)) { return true; } else { return false; }</pre>
Resolution	Detail	Claim Reject Draft Layout	Any	<pre>if('ORA_ACO_RESTYP_ REJECT'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c) &amp;&amp;('ORA_ACO_RESSTA_ DRAFT'.equalsIgnoreCase(_ _ORACO__Status_c)) &amp;&amp;('ORA_ACO_RESOBJ_ CLAIM'.equalsIgnoreCase(_ _ORACO__SourceObject_ c))) { return true; } else { return false; }</pre>
Resolution	Detail	Claim Reject Approval Layout	Any	<pre>if('ORA_ACO_RESTYP_ REJECT'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c) &amp;&amp;('ORA_ACO_RESSTA_ PENDAPP'.equalsIgnoreCase(_ _ORACO__Status_c)) &amp;&amp;('ORA_ACO_RESOBJ_ CLAIM'.equalsIgnoreCase(_ _ORACO__SourceObject_ c))) { return true; } else { return false; }</pre>
Resolution	Detail	Claim Reject Final Layout	Any	<pre>if(('ORA_ACO_RESTYP_ REJECT'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c)) &amp;&amp;('ORA_ACO_RESSTA_ APPROVED'.equalsIgnoreCase(_ _ORACO__Status_c))    ('ORA_ACO_RESSTA_ REJECTED'.equalsIgnoreCase(_ _ORACO__Status_c))     (!('ORA_ACO_CLASTAT_ INPROG'.equalsIgnoreCase(_ _ORACO__Claim_Obj_c?._ _ORACO__Status_c)) &amp;&amp; (!('ORA_ACO_CLASTAT_ SUBMITTED'.equalsIgnoreCase(_</pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> _ORACO__Claim_Obj_c?._ _ORACO__Status_c )))  &amp;&amp;('ORA_ACO_RESOBJ_ CLAIM'.equalsIgnoreCase(_ _ORACO__SourceObject_ c)))  { return true; } else { return false; } </pre>
Resolution	Detail	Deduction Funded Draft Layout	Any	<pre> if(('ORA_ACO_RESTYP_ FUNDPAY'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c)) &amp;&amp;('ORA_ACO_RESSTA_ DRAFT'.equalsIgnoreCase(_ _ORACO__Status_c)) &amp;&amp;('ORA_ACO_RESOBJ_ DEDUCTION'.equalsIgnoreCase(_ _ORACO__SourceObject_ c))) { return true; } else { return false; } </pre>
Resolution	Detail	Deduction Funded Non Draft Layout	Any	<pre> if(('ORA_ACO_RESTYP_ FUNDPAY'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c)) &amp;&amp;(!('ORA_ACO_RESSTA_ DRAFT'.equalsIgnoreCase(_ _ORACO__Status_c)) &amp;&amp;('ORA_ACO_RESOBJ_ DEDUCTION'.equalsIgnoreCase(_ _ORACO__SourceObject_ c))) { return true; } else { return false; } </pre>
Resolution	Detail	Deduction Other Draft Layout	Any	<pre> if(((('ORA_ACO_RESTYP_ CHARGEBACK'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c))    ('ORA_ACO_RESTYP_ UNFUNDPAY'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c))    ('ORA_ACO_RESTYP_ WRITEOFF'.equalsIgnoreCase(_ </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> _ORACO__ ResolutionType_c)) &amp;&amp;(('ORA_ACO_RESSTA_ DRAFT'.equalsIgnoreCase(_ _ORACO__Status_c)) &amp;&amp;('ORA_ACO_RESOBJ_ DEDUCTION'.equalsIgnoreCase(_ _ORACO__SourceObject_ c))) { return true; } else { return false; } </pre>
Resolution	Detail	Deduction Other Approval Layout		<pre> if(((('ORA_ACO_RESTYP_ CHARGEBACK'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c))   ('ORA_ACO_RESTYP_ UNFUNDPAY'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c))   ('ORA_ACO_RESTYP_ WRITEOFF'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c)) &amp;&amp;('ORA_ACO_RESSTA_ PENDAPP'.equalsIgnoreCase(_ _ORACO__Status_c)) &amp;&amp;('ORA_ACO_RESOBJ_ DEDUCTION'.equalsIgnoreCase(_ _ORACO__SourceObject_ c)))) { return true; } else { return false; } </pre>
Resolution	Detail	Deduction Other Final Layout		<pre> if(((('ORA_ACO_RESTYP_ CHARGEBACK'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c))   ('ORA_ACO_RESTYP_ UNFUNDPAY'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c))   ('ORA_ACO_RESTYP_ WRITEOFF'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c)) &amp;&amp;('ORA_ACO_RESSTA_ APPROVED'.equalsIgnoreCase(_ _ORACO__Status_c))   </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> ('ORA_ACO_RESSTA_ REJECTED'.equalsIgnoreCase(_ _ORACO__Status_c))     (!('ORA_ACO_CLASTAT_ INPROG'.equalsIgnoreCase(_ _ORACO__Deduction_Obj_ c?._ORACO__Status_c)) &amp;&amp; (!('ORA_ACO_CLASTAT_ SUBMITTED'.equalsIgnoreCase(_ _ORACO__Deduction_Obj_ c?._ORACO__Status_ c))))  &amp;&amp;('ORA_ACO_RESOBJ_ DEDUCTION'.equalsIgnoreCase(_ _ORACO__SourceObject_ c)) { return true; } else { return false; } </pre>
Resolution	Detail	Claim Funded Withdrawn Return Layout	Any	<pre> if(('ORA_ACO_RESTYP_ FUNDPAY'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c)) &amp;&amp;('ORA_ACO_RESSTA_ WITHDRAWN'.equalsIgnoreCase(_ _ORACO__Status_c)     'ORA_ACO_RESSTA_ RETURNED'.equalsIgnoreCase(_ _ORACO__Status_c)) &amp;&amp;('ORA_ACO_RESOBJ_ CLAIM'.equalsIgnoreCase(_ _ORACO__SourceObject_ c))  &amp;&amp; ('ORA_ACO_CLASTAT_ INPROG'.equalsIgnoreCase(_ _ORACO__Claim_Obj_c?._ _ORACO__Status_c))) { return true; } else { return false; } </pre>
Resolution	Detail	Claim Reject Withdrawn Layout	Any	<pre> if(('ORA_ACO_RESTYP_ REJECT'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c)) </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> &amp;&amp;('ORA_ACO_RESSTA_ WITHDRAWN'.equalsIgnoreCase(_ _ORACO__Status_c))  &amp;&amp;('ORA_ACO_RESOBJ_ CLAIM'.equalsIgnoreCase(_ _ORACO__SourceObject_ c))  &amp;&amp; ('ORA_ACO_CLASTAT_ INPROG'.equalsIgnoreCase(_ _ORACO__Claim_Obj_c?._ _ORACO__Status_c)) { return true; } else { return false; } </pre>
Resolution	Detail	Deduction Funded Withdrawn Return Layout	Any	<pre> if(('ORA_ACO_RESTYP_ FUNDPAY'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c)) &amp;&amp;('ORA_ACO_RESSTA_ WITHDRAWN'.equalsIgnoreCase(_ _ORACO__Status_c)     'ORA_ACO_RESSTA_ RETURNED'.equalsIgnoreCase(_ _ORACO__Status_c)) &amp;&amp;('ORA_ACO_RESOBJ_ DEDUCTION'.equalsIgnoreCase(_ _ORACO__SourceObject_ c))  &amp;&amp; ('ORA_ACO_CLASTAT_ INPROG'.equalsIgnoreCase(_ _ORACO__Deduction_Obj_ c?._ORACO__Status_ c))) { return true; } else { return false; } </pre>
Resolution	Detail	Deduction Other Withdrawn Layout	Any	<pre> if(!('ORA_ACO_RESTYP_ FUNDPAY'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c)) &amp;&amp;('ORA_ACO_RESSTA_ WITHDRAWN'.equalsIgnoreCase(_ _ORACO__Status_c)  &amp;&amp;('ORA_ACO_RESOBJ_ DEDUCTION'.equalsIgnoreCase(_ </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> _ORACO__SourceObject_ c))  &amp;&amp; ('ORA_ACO_CLASTAT_ INPROG'.equalsIgnoreCase(_ _ORACO__Deduction_Obj_ c?._ORACO__Status_ c))) { return true; } else { return false; } </pre>
Resolution	Detail	Claim Funded Read Only Layout	Sales Representative Custom Sales Manager Custom	<pre> if (('ORA_ACO_RESTYP_ FUNDPAY'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c))  &amp;&amp; ('ORA_ACO_RESOBJ_ CLAIM'.equalsIgnoreCase(_ _ORACO__SourceObject_ c)))  return true  else  return false </pre>
Resolution	Detail	Claim Reject Read Only Layout	Sales Representative Custom Sales Manager Custom	<pre> if (('ORA_ACO_RESTYP_ REJECT'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c))  &amp;&amp; ('ORA_ACO_RESOBJ_ CLAIM'.equalsIgnoreCase(_ _ORACO__SourceObject_ c)))  return true  else  return false </pre>
Resolution	Detail	Deduction Funded Read Only Layout	Sales Representative Custom Sales Manager Custom	<pre> if (('ORA_ACO_RESTYP_ FUNDPAY'.equalsIgnoreCase(_ _ORACO__ ResolutionType_c)) </pre>



Object	Page Layout	Layout Name	Role	Advanced Expression
				<pre> &amp;&amp;('ORA_ACO_RESOBJ_ DEDUCTION'.equalsIgnoreCase( _ORACO__SourceObject_ c)) { return true; } else { return false; } </pre>
Resolution	Detail	Deduction Other Read Only Layout	Sales Representative Custom Sales Manager Custom	<pre> if(!('ORA_ACO_RESTYP_ FUNDPAY'.equalsIgnoreCase( _ORACO__ ResolutionType_c)) &amp;&amp;('ORA_ACO_RESOBJ_ DEDUCTION'.equalsIgnoreCase( _ORACO__SourceObject_ c))) { return true; } else { return false; } </pre>
Deduction	Landing Page	ORACO Duplicate Layout		
Deduction	Create	ORACO Duplicate Layout		
Deduction	Detail	Internal Draft Layout		<pre> if('ORA_ACO_CLASTAT_ DRAFT'.equalsIgnoreCase( _ORACO__Status_c)) return true; else return false; </pre>
Deduction	Detail	Internal Non Draft Layout		<pre> if(!('ORA_ACO_CLASTAT_ DRAFT'.equalsIgnoreCase( _ORACO__Status_c))) return true; else return false; </pre>
Deduction	Detail	Partner Detail Layout		<pre> if(!('ORA_ACO_CLASTAT_ DRAFT'.equalsIgnoreCase( _ORACO__Status_c))) return true; else return false; </pre>

Object	Page Layout	Layout Name	Role	Advanced Expression
Deduction	Detail	Resolved Closed Layout		<pre> if(('ORA_ACO_CLASTAT_RESOLVED'.equalsIgnoreCase(_ORACO_Status_c))  ('ORA_ACO_CLASTAT_CLOSED'.equalsIgnoreCase(_ORACO_Status_c))) return true; else return false; </pre>
Deduction	Detail	Internal Read Only Layout	Sales Representative Custom Sales Manager Custom	<pre> if(!('ORA_ACO_CLASTAT_DRAFT'.equalsIgnoreCase(_ORACO_Status_c))) return true; else return false; </pre>
Deduction	Detail	Internal Draft Read Only Layout	Sales Representative Custom Sales Manager Custom	<pre> if('ORA_ACO_CLASTAT_DRAFT'.equalsIgnoreCase(_ORACO_Status_c)) return true; else return false; </pre>
Input OPA Buffer	Landing Page	ORACO Duplicate Layout		
Input OPA Buffer	Create	ORACO Duplicate Layout		
Input OPA Buffer	Detail	ORACO Duplicate Layout		
Input OPA Buffer	Search and Select Dialog	ORACO Duplicate Layout		
Deduction	Landing Page	ORACO Duplicate Layout		
Deduction	Create	ORACO Duplicate Layout		
Deduction	Detail	ORACO Duplicate Layout		
Deduction	Search and Select Dialog	ORACO Duplicate Layout		

**Distributor Objects**

Object	Page Layout	Layout Name	Role	Advanced Expression
Account Distributor Relationship	Landing Page	ORACO Duplicate Layout	Any	
Account Distributor Relationship	Create	ORACO Duplicate Layout	Any	
Account Distributor Relationship	Detail	ORACO Duplicate Layout	Any	
Account Distributor Relationship	Search	ORACO Duplicate Layout	Any	
Account	Detail	ORACO Telesales Distributor Layout	Any	<code>if(ORACO_Distributor_c == 'Y') {return true;}</code>
Account	Detail	ORACO Telesales Sales Rep Layout	Any	
Account	Detail	ORACO Telesales Admin Layout	Any	
Account	Detail	ORACO Telesales Account Mgr Layout	Any	
Account	Detail	ORACO Telesales Mkt Manager Layout	Any	
Account	Detail	ORACO Telesales Rep Manager Layout	Any	
Account	Detail	ORACO Telesales Duplicate Layout	Any	
Assortment	Detail	ORACO Duplicate Layout	Any	
Assortment	Detail	ORACO Duplicate AM Layout	Any	
Assortment	Detail	ORACO Duplicate Layout Doc Cloud	Any	
Assortment	Detail	ORACO Duplicate Layout Doc Cloud Plan	Any	

## Product Detailing

Object	Application	Page Layout	Layout Name	Role	Advanced Expression
Manufacturer	Common	Landing	ORACO Duplicate Layout	Any	
Manufacturer	Common	Create	ORACO Duplicate Layout	Any	
Manufacturer	Common	Detail	ORACO Duplicate Layout	Any	
Manufacturer	Common	Reusable	ORACO Duplicate Layout	Any	
Detailing Product Group	Common	Landing	ORACO Duplicate Layout	Any	
Detailing Product Group	Common	Create	ORACO Duplicate Layout	Any	
Detailing Product Group	Common	Detail	ORACO Duplicate Layout	Any	
Detailing Product Group	Common	Reusable	ORACO Duplicate Layout	Any	
Product Detailing	Common	Landing	ORACO Duplicate Layout	Any	
Product Detailing	Common	Create	ORACO Duplicate Layout	Any	
Product Detailing	Common	Detail	ORACO Duplicate Layout	Any	
Product Detailing	Common	Reusable	ORACO Duplicate Layout	Any	
Activity	Common	Appointment Details	<b>Before Checkin Layout</b>	Any	<pre>if ( _ORACO_VisitStatusFCL_c == 'ORA_ACO_VISIT_STATUS_NSTARTED' ) { return true } else { return false }</pre>
Activity	Common	Appointment Details	<b>Before checkin layout for roles</b>	Sales Manager, Sales Administrator	<pre>if ( _ORACO_VisitStatusFCL_c == 'ORA_ACO_VISIT_STATUS_</pre>

Object	Application	Page Layout	Layout Name	Role	Advanced Expression
					<pre>NSTARTED') { return true } else { return false }</pre>
Activity	Common	Appointment Details	After Checkin Layout	Any	<pre>if(__ORACO__ VisitStatusFCL_ c=='ORA_ACO_ VISIT_STATUS_ INPROGR') { return true } else { return false }</pre>
Activity	Common	Appointment Details	After Checkout Layout	Any	<pre>if(__ORACO__ VisitStatusFCL_ c=='ORA_ACO_ VISIT_STATUS_ COMPLETED') { return true } else { return false }</pre>
Activity	Common	Appointment Details	PD Create After Checkout Layout	Any	<pre>if((__ORACO__ VisitStatusFCL_ c=='ORA_ACO_ VISIT_STATUS_ COMPLETED') &amp;&amp;(oracle.apps.fnd.applco __ORACO__ENABLE_ PD_UPDATE_AFTR_ CHECKOUT" )=="Y")) { return true } else { return false }</pre>
Activity	Common	Appointment Details	DSD Before Checkin Layout	Any	<pre>if(__ORACO__ VisitStatusFCL_ c=='ORA_ACO_ VISIT_STATUS_ NSTARTED') { return true } else { return false }</pre>
Activity	Common	Appointment Details	DSD sales admin and mangr before checkin layout	Sales Manager, Sales Administrator	<pre>if(__ORACO__ VisitStatusFCL_ c=='ORA_ACO_ VISIT_STATUS_ NSTARTED') { return true } else { return false }</pre>
Activity	Common	Appointment Details	DSD After Checkin Layout	Any	<pre>if(__ORACO__ VisitStatusFCL_ c=='ORA_ACO_</pre>

Object	Application	Page Layout	Layout Name	Role	Advanced Expression
					<pre>VISIT_STATUS_ INPROGR') { return true } else { return false }</pre>
Activity	Common	Appointment Details	DSD After Checkout Layout	Any	<pre>if( __ORACO__ VisitStatusFCL_ c=='ORA_ACO_ VISIT_STATUS_ COMPLETED') { return true } else { return false }</pre>
Activity	Common	Appointment Details	Not Serviced Layout	Any	<pre>if( __ORACO__ VisitStatusFCL_ c=='ORA_ACO_ VISIT_STATUS_ NSERVICED') { return true } else { return false }</pre>
Activity	Common	Appointment Details	DSD Not Serviced Layout	Any	<pre>if( __ORACO__ VisitStatusFCL_ c=='ORA_ACO_ VISIT_STATUS_ NSERVICED') { return true } else { return false }</pre>
Activity	Common	Appointment Details	DSD PD Create Checkout Layout	Any	<pre>if(( __ORACO__ VisitStatusFCL_ c=='ORA_ACO_ VISIT_STATUS_ COMPLETED') &amp;&amp;(oracle.apps.fnd.applco __ORACO__ENABLE_ PD_UPDATE_AFTR_ CHECKOUT" )=="Y")) { return true } else { return false }</pre>

## Duplicate Layouts for Surveys

As a sales administrator, you can enable surveys by duplicating the layouts for account and promotion objects.

The order of duplicating layouts must be:

1. Landing page
2. Create
3. Detail
4. Search and Select Dialog or Reusable Regions

Here's how you can duplicate the layouts:

1. Activate a sandbox.
2. Select Application Composer from navigation.
3. Select **Standard Objects > Account > Pages** and duplicate the following layouts.

Object	Application	Page Layout	Layout Name	Role	Expression
Account	Common	Landing Page	ORACO Duplicate Layout	Any	
Account	Common	Detail	ORACO Duplicate Layout	Any	
Account	Common	Detail	ORACO Sales Representative Layout	Sales Representative Custom	
Account	Common	Detail	ORACO Sales Manager Layout	Sales Manager Custom Account Manager Custom	
Account	Common	Detail	ORACO Marketing Manager Layout	Marketing Manager Custom	
Account	Common	Detail	ORACO Telesales Duplicate Layout	Any	
Account	Common	Detail	ORACO Telesales Representative Manager Layout	Sales Representative Custom, Sales Manager Custom	
Account	Common	Detail	ORACO Telesales Marketing Manager Layout	Marketing Manager Custom	
Account	Common	Search and Select Dialog	ORACO Duplicate Layout	Any	

Object	Application	Page Layout	Layout Name	Role	Expression
Promotion	Sales	Landing Page	ORACO Duplicate Layout	Any	
Promotion	Sales	Landing Page	Pricing ORACO Duplicate Layout	Any	
Promotion	Sales	Detail	ORACO Duplicate Layout	Any	
Promotion	Sales	Detail	Approved Layout	Sales Representative Custom	
Promotion	Sales	Detail	Approved Layout	Sales Manager Custom	
Promotion	Sales	Detail	Approved Layout for Marketing Manager	Marketing Manager Custom	if(ORACO__Status_c=='ORACO_PROMOTION_APPROVED') return true
Promotion	Sales	Detail	Draft Layout for Non-Account Manager	Marketing Manager Custom	
Promotion	Sales	Detail	Draft Layout for Non-Account Manager	Any	
Promotion	Sales	Detail	Draft Layout for Account Manager	Sales Administrator Custom	if(ORACO__Status_c=='ORACO_PROMOTION_DRAFT') return true
Promotion	Sales	Detail	Draft Layout for Account Manager	Account Manager Custom	
Promotion	Sales	Detail	Approved Layout for Account Manager	Sales Administrator Custom	if(ORACO__Status_c=='ORACO_PROMOTION_APPROVED') return true
Promotion	Sales	Detail	Approved Layout for Account Manager	Account Manager Custom	



Object	Application	Page Layout	Layout Name	Role	Expression
Promotion	Sales	Detail	Discount Model Layout for Volume Discount	Any	if( __ORACO__ DiscountType_c == 'ORA_ACO_VD')return true
Promotion	Sales	Detail	Discount Model Layout for Dynamic Combo	Any	if( __ORACO__ DiscountType_c == 'ORA_ACO_DC')return true
Promotion	Sales	Detail	Discount Model Layout for Fixed Combo	Any	if( __ORACO__ DiscountType_c == 'ORA_ACO_FC')return true
Promotion	Sales	Detail	Discount Model Layout for Fixed Discount	Any	if( __ORACO__ DiscountType_c == 'ORA_ACO_FD'    __ORACO__ DiscountType_c == null)return true
Promotion	Sales	Detail	Draft Layout for Volume Discount for Account Manager	Account Manager Custom	if( __ORACO__ Status_c=='ORA_ACO_PROMOTION_DRAFT' && __ORACO__ DiscountType_c == 'ORA_ACO_VD')return true
Promotion	Sales	Detail	Draft Layout for Dynamic Combo for Account Manager	Account Manager Custom	if( __ORACO__ Status_c=='ORA_ACO_PROMOTION_DRAFT' && __ORACO__ DiscountType_c == 'ORA_ACO_DC')return true
Promotion	Sales	Detail	Draft Layout for Fixed Combo for Account Manager	Account Manager Custom	if( __ORACO__ Status_c=='ORA_ACO_PROMOTION_DRAFT' && __ORACO__ DiscountType_c == 'ORA_ACO_FC')return true
Promotion	Sales	Detail	Draft Layout for Fixed Discount for Account Manager	Account Manager Custom	if( __ORACO__ Status_c=='ORA_ACO_PROMOTION_DRAFT' && ( __ORACO__ DiscountType_c == 'ORA_ACO_

Object	Application	Page Layout	Layout Name	Role	Expression
					FD'    __ORACO__DiscountType_c == null)) return true
Promotion	Sales	Search and Select Dialog	ORACO Duplicate Layout	Any	
Survey Questions (__ORACO__SurveyQuestions_c)	Common	Landing	ORACO Duplicate Layout	Any	
Survey Questions (__ORACO__SurveyQuestions_c)	Common	Create	ORACO Duplicate Layout	Any	
Survey Questions (__ORACO__SurveyQuestions_c)	Common	Detail	ORACO Duplicate Layout	Any	
Survey Questions (__ORACO__SurveyQuestions_c)	Common	Reusable Region	ORACO Duplicate Layout	Any	
Survey Template (__ORACO__SurveyTemplate_c)	Common	Detail	ORACO Duplicate Layout	Any	

**Note:** To enable surveys and survey template, set up the role security for the survey and survey template object.

# 6 Profile Options

## About Profile Options

Profile options are permanent user preferences and system configuration options. You can view and edit them. For full list of profile options, see Setup section of Configuring Oracle CX for Consumer Goods (My Oracle Support Document ID 2768834.2).

## View and Edit Profile Options

Here's how you can view profile options:

1. Go to **Setup and Maintenance** work area.
2. Click **Tasks > Search** and enter **Manage Profile Options**.

Open the task.

3. Search using the profile option code.

Here's how you can edit profile options:

1. Go to **Setup and Maintenance** work area.
2. Click **Tasks > Search** and enter **Manage Administrator Profile Values**.

Open the task.

3. Search using the profile option code.
4. Change the profile value.
5. Click **Save and Close**.

*Related Topics*



# 7 Role Security for Objects

## Understand Role Based Access and Security Considerations

As administrators, you can define the role-based access control to manage the use of the application resources.

You can define and grant the users permissions to work with application functions and data based on their roles in your organization. You can assign a user different roles and grant access to the resources. The job role providing the greatest level of access takes precedence.

Role-based security in Oracle Cloud applications helps you manage and control who can do what on which set of data. You can assign job and abstract roles to a user manually, when you create the user, or automatically, by creating role provisioning rules.

For more information about the role-based controls, see Oracle CX Sales Securing sales and Service guide.

The following roles use the retail execution and promotions management:

- Sales Manager
- Field salesperson
- Marketing Manager

Additionally, you must create and configure Account Manager role that's covered in Setup and Maintenance configurations in this document.

For information about how you implement and manage users and roles, see Oracle CX Sales Getting Started with Implementation guide.

### Role Based Tasks Matrix

The following table lists the objects related to retail execution and trade promotion tasks and lists the associated roles and privileges.

Retail Objects	Tasks	Sales Manager	Field Sales Representative	Marketing Manager	Account Manager
Accounts	Create	Yes	Yes	Yes	Yes
Accounts	View	Yes	Yes	Yes	No
Accounts	Update	Yes	Yes	Yes	No
Accounts	Delete	No	No	No	No
Promotion	Create	No	No	No	Yes

Retail Objects	Tasks	Sales Manager	Field Sales Representative	Marketing Manager	Account Manager
Promotion	View	Yes	Yes	Yes	Yes
Promotion	Update	No	No	No	Yes
Promotion	Delete	No	No	No	Yes
Promotion Program	Create	No	No	Yes	No
Promotion Program	View	No	No	Yes	Yes
Promotion Program	Update	No	No	Yes	No
Promotion Program	Delete	No	No	Yes	No
Order	Create	Yes	Yes	No	No
Order	View	Yes	Yes	No	No
Order	Update	Yes	Yes	No	No
Order	Delete	Yes	Yes	No	No
Inventory	Create	Yes	Yes	No	No
Inventory	View	Yes	Yes	No	No
Inventory	Update	Yes	Yes	No	No
Inventory	Delete	Yes	Yes	No	No
Appointments	Create	Yes	Yes	Yes	Yes
Appointments	View	Yes	Yes	Yes	Yes
Appointments	Update	Yes	Yes	No	Yes
Appointments	Delete	Yes	Yes	No	Yes

When you sign in, the details on the pages that you view can appear differently based on your role.

# Set Up Object Role Security

To set up the role-specific security privileges for the common application, perform the following steps:

1. Sign in as the administrator user and navigate to Application Composer.

**Note:** Ensure that the administrator user has been assigned the Customer Relationship Management application administrator role.

2. Select **Common Application** from the drop-down list.
3. Select **Role Security** from the Common setup.
4. Use the following tables to set the roles for account manager, marketing manager, sales manager, sales representative, and sales administrator:

## For Common Application

Enable the security settings for objects in the common application for the custom objects administration role, account manager custom role, marketing manager custom role, sales manager custom role, and sales administrator custom role.

For the custom objects administration role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ BusinessPlan_c	Business Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountObjTask_c	Account Object Task	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountTaskDetails_c	Account Task Details	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountObjective_c	Account Objective	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ KPILibrary_c	KPI Library	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ObjectiveCluster_c	Objective Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ KPIRelationship_c	KPI Relationship	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Manufacturer_c	Manufacturer	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ManufacturerToTeam_c	Manufacturer Team	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__DetailingPrdGrp_c	Detailing Product Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__DetailingGroupTeam_c	Detailing Group Team	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ProductDetailing_c	Product Detailing	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AccDistributorRel_c	Account Distributor Relationship	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Budget_c	Budget	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Fund_c	Fund	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__FundAllocation_c	Fund Allocation	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PrintDocument_c	Print Document	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__TemplateFile_c	Print Template File	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AccountPromotion_c	Account Promotion	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AccountSurveys_c	Account Survey	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AuditHistory_c	Audit History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ComboGroupDSD_c	Combo Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ComboGroupItemDSD_c	Combo Group Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete



Object	Display Name	Create	Read	Update	Delete
__ORACO__Coupon_c	Coupon	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__CouponTransaction_c	Coupon Settlement	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__CreditLineDSD_c	Credit Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__CreditNoteDSD_c	Credit Note	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__DistributeCentre_c	Distribution Center	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Document_c	Document	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Expense_c	Expense	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__InvAuditLineDSD_c	Inventory Audit Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Inventory_c	Inventory	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__InventoryAudit_c	Inventory Audit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__InventoryAuditDSD_c	Inventory Audit Report	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__InventoryAuditLine_c	Inventory Audit Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__InventoryReloadDSD_c	Inventory Reload Report	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__InvoiceDSD_c	Invoice	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__InvoiceLineDSD_c	Invoice Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__InvReloadLineDSD_c	Inventory Reload Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ LegalEntity_c	Legal Entity	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Order_c	Order	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderDSD_c	Order Request	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderItems_c	Order Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderLineDSD_c	Order Line Request	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderLineRollup_c	Order Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderLStatusDSD_c	Order Line Status	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderRollup_c	Order	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderStatusDSD_c	Order Status	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PaymentDSD_c	Payment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PaymentLineDSD_c	Payment Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProdAssortmentLine_c	Assortment Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductAssortment_c	Assortment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Route_c	Route	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RouteAllocation_c	Route Allocation	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ RouteAssignHist_c	Route Assignment History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RouteCheckInHist_c	Route Check In History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RouteInventory_c	Route Inventory	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RouteInvTransDSD_c	Route Inventory Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RoutePresettlement_c	Route Pre-Settlement Report	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ SalesTarget_c	Sales Target	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShipmentDSD_c	Shipment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShipmentLineDSD_c	Shipment Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCart_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartDSD_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartItem_c	Shopping Cart Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartPromo_c	Shopping Cart Promo	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartTpl_c	Shopping Cart Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ SurveyTemplate_c	Survey Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionUsageTxn_c	Promotion Usage Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Package_c	Package	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ BankAccount_c	Bank Account	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ObjConfig_c	Object Configuration	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__FldConfig_ c	Field Configuration	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BankDeposit_c	Bank Deposit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AssortmentLineRel_c	Assortment Line Relationship	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContainerClass_c	Container Class	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccContainerClass_c	Account Container Class	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContainerClassBal_c	Container Class Balance	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContainerClassTxn_c	Container Class Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchLocPlan_c	Merchandising Location Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchLocPCluster_c	Merchandising Location Plan Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchLocation_c	Merchandising Location	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreCreditTrans_c	Store Credit Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreCredit_c	Store Credit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ClaimRequest_c	Claim	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ ClaimRequestItems_c	Claim Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ DeductionRequest_c	Deduction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Resolution_ c	Resolution	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Benefit_c	Benefit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BenefitBalanceTxn_c	Benefit Balances	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BenefitGuard_c	Benefit Guard	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccruedBenefitTxn_c	Benefit Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ComplianceHistory_c	Condition	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchMatAlocPlan_c	Allocation Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MMAllocPlanRoute_c	MM Allocation Plan Routes	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Condition_ c	Condition	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ConditionComplHist_c	Condition Compliance History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ConditionGuard_c	Condition Guard	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CGContract_c	Contract	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CGContractTemplate_c	Contract Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountContract_c	Account Contract	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ ContractJobSched_c	Contract Job Schedule	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ManualAccrualSched_c	Distribution Schedule	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CTemplateCluster_c	CTemplateCluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AttainmentTarget_c	Attainment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ForecastAttainment_c	Forecast Attainment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductBenefit_c	Product Benefit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ConditionProduct_c	Condition Product	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Term_c_c	Term	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CGContractPrintTpt_c	Contract Print Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ SalesTarget_c	Sales Target	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShipmentDSD_c	Shipment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShipmentLineDSD_c	Shipment Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCart_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartDSD_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartItem_c	Shopping Cart Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ ShoppingCartPromo_c	Shopping Cart Promo	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartTmpI_c	Shopping Cart Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ SurveyTemplate_c	Survey Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionUsageTxn_c	Promotion Usage Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Package_c	Package	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BankAccount_c	Bank Account	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ObjConfig_c	Object Configuration	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__FldConfig_c	Field Configuration	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BankDeposit_c	Bank Deposit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AssortmentLineRel_c	Assortment Line Relationship	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContainerClass_c	Container Class	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccContainerClass_c	Account Container Class	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContainerClassBal_c	Container Class Balance	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContainerClassTxn_c	Container Class Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchLocation_c	Merchandising Location	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreCreditTrans_c	Store Credit Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ StoreCredit_c	Store Credit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ClaimRequest_c	Claim	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ClaimRequestItems_c	Claim Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ DeductionRequest_c	Deduction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Resolution_ c	Resolution	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContainerClass_c	Container Class	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccContainerClass_c	Account Container Class	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContainerClassBal_c	Container Class Balance	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContainerClassTxn_c	Container Class Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchLocation_c	Merchandising Location	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreCreditTrans_c	Store Credit Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreCredit_c	Store Credit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ClaimRequest_c	Claim	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ClaimRequestItems_c	Claim Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ DeductionRequest_c	Deduction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete



Object	Display Name	Create	Read	Update	Delete
__ORACO_Resolution_c	Resolution	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Benefit_c	Benefit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__BenefitBalanceTxn_c	Benefit Balances	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__BenefitGuard_c	Benefit Guard	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AccruedBenefitTxn_c	Benefit Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ComplianceHistory_c	Compliance History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Condition_c	Condition	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ConditionComplHist_c	Condition Compliance History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ConditionGuard_c	Condition Guard	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__CGContract_c	Contract	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__CGContractTemplate_c	Contract Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AccountContract_c	Account Contract	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ContractJobSched_c	Contract Job Schedule	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ManualAccrualSched_c	Distribution Schedule	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__CTemplateCluster_c	CTemplateCluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ AttainmentTarget_c	Attainment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ForecastAttainment_c	Forecast Attainment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductBenefit_c	Product Benefit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ConditionProduct_c	Condition Product	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Term_c_c	Term	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchMaterialAlloc_c	Merchandising Material Allocation	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchMaterial_c	Merchandising Material	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShopCartTplPlan_c	Shopping Cart Template Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartTpl_c	Shopping Cart Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShopCartTplHeadr_c	Shopping Cart Template Header	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PrintTmplClustr_c	Print Template Clusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ SurveyQuestions_c	Survey Questions	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ObjAttribute_c	Object Attribute	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ObjConfig_c	Object Configuration	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ FilterCriteriaGrp_c	Filter Criteria Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ FilterCriteria_c	Filter Criteria	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__SyncRule_c	Sync Rule	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__SyncField_c	Sync Field	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

For the account manager custom role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__Budget_c	Budget	N	N	N	N
__ORACO__Fund_c	Fund	N	Read All, Functional Read	N	N
__ORACO__FundAllocation_c	Fund Allocation	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PrintDocument_c	Print Document	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__TemplateFile_c	Print Template File	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ShopCartTplPlan_c	Shopping Cart Template Plan	N	Read All, Functional Read	None	None
__ORACO__ShoppingCartTpl_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__ShopCartTplHdr_c	Shopping Cart Template Header	N	Read All, Functional Read	None	None
__ORACO__CGContractHistory_c	Contract History	Y	Read All, Functional Read	None	None
__ORACO__MerchMatAlocPlan_c	Allocation Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__MMAllocPlanRoute_c	<b>MM Allocation Plan Routes</b>	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AccountPromotion_c	Account Promotion	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ AccountSurveys_c	Account Survey	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AuditHistory_c	Audit History	Y	Read All, Functional Read	Update All, Functional Update	Functional Delete
__ORACO__ ComboGroupDSD_c	Combo Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ComboGroupItemDSD_ c	Combo Group Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Coupon_c	Coupon	N	Read All, Functional Read	None	None
__ORACO__ CouponTransaction_c	Coupon Settlement	N	Read All, Functional Read	None	None
__ORACO__ CreditLineDSD_c	Credit Line	N	Read All, Functional Read	None	None
__ORACO__ CreditNoteDSD_c	Credit Note	N	Read All, Functional Read	None	None
__ORACO__ DistributeCentre_c	Distribution Center	N	Read All, Functional Read	None	None
__ORACO__ Document_c	Document	N	Read All, Functional Read	None	None
__ORACO__ Expense_c	Expense	N	Read All, Functional Read	None	None
__ORACO__ InvAuditLineDSD_c	Inventory Audit Line	N	Read All, Functional Read	None	None
__ORACO__ Inventory_ c	Inventory	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ InventoryAudit_c	Inventory Audit	N	None	None	None
__ORACO__ InventoryAuditDSD_c	Inventory Audit Report	N	Read All, Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ InventoryAuditLine_c	Inventory Audit Line	N	None	None	None
__ORACO__ InventoryReloadDSD_c	Inventory Reload Report	N	Read All, Functional Read	None	None
__ORACO__ InvoiceDSD_c	Invoice	Y	Read All, Functional Read	None	None
__ORACO__ InvoiceLineDSD_c	Invoice Line	Y	Read All, Functional Read	None	None
__ORACO__ InvReloadLineDSD_c	Inventory Reload Line	N	Read All, Functional Read	None	None
__ORACO__ LegalEntity_c	Legal Entity	N	Read All, Functional Read	None	None
__ORACO__ Order_c	Order	Y	Read All, Functional Read	Functional Update	None
__ORACO__ OrderDSD_c	Order Request	Y	Read All, Functional Read	None	None
__ORACO__ OrderItems_c	Order Item	Y	Read All, Functional Read	Functional Update	None
__ORACO__ OrderLineDSD_c	Order Line Request	Y	Read All, Functional Read	None	None
__ORACO__ OrderLineRollup_c	Order Line	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ OrderLStatusDSD_c	Order Line Status	N	Read All, Functional Read	None	None
__ORACO__ OrderRollup_c	Order	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ OrderStatusDSD_c	Order Status	N	Read All, Functional Read	None	None
__ORACO__ PaymentDSD_c	Payment	Y	Read All, Functional Read	None	None
__ORACO__ PaymentLineDSD_c	Payment Line	Y	Read All, Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ ProdAssortmentLine_c	Assortment Line	Y	Read All, Functional Read	Functional Update	Functional Delete
__ORACO__ ProductAssortment_c	Assortment	Y	Read All, Functional Read	Functional Update	Functional Delete
__ORACO__Route_c	Route	N	Read All, Functional Read	None	None
__ORACO__ RouteAllocation_c	Route Allocation	N	Read All, Functional Read	None	None
__ORACO__ RouteAssignHist_c	Route Assignment History	N	Read All, Functional Read	None	None
__ORACO__ RouteCheckInHist_c	Route Check In History	N	Read All, Functional Read	None	None
__ORACO__ RouteInventory_c	Route Inventory	N	None	None	None
__ORACO__ RouteInvTransDSD_c	Route Inventory Transaction	N	None	None	None
__ORACO__ RoutePresettlement_c	Route Pre-Settlement Report	N	Read All, Functional Read	None	None
__ORACO__ SalesTarget_c	Sales Target	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShipmentDSD_c	Shipment	N	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ ShipmentLineDSD_c	Shipment Line	N	Read All, Functional Read	None	None
__ORACO__ ShoppingCart_c	Shopping Cart	N	None	None	None
__ORACO__ ShoppingCartDSD_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ ShoppingCartItem_c	Shopping Cart Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ ShoppingCartPromo_c	Shopping Cart Promo	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartTmpI_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__ SurveyTemplate_c	Survey Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionUsageTxn_c	Promotion Usage Transaction	Y	Read All, Functional Read	Update All, Functional Update	None
ORACO__Package_c	Package	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ BankAccount_c	Bank Account	N	Read All, Functional Read	None	None
__ORACO__ ObjConfig_c	Object Configuration	N	None	None	None
__ORACO__FldConfig_ c	Field Configuration	N	None	None	None
__ORACO__ BankDeposit_c	Bank Deposit	N	Read All, Functional Read	None	None
__ORACO__ AssortmentLineRel_c	Assortment Line Relationship	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContainerClass_c	Container Class	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccContainerClass_c	Account Container Class	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContainerClassBal_c	Container Class Balance	N	Read All, Functional Read	None	None
__ORACO__ ContainerClassTxn_c	Container Class Transaction	N	Read All, Functional Read	None	None
__ORACO__ StoreCredit_c	Store Credit	N	Functional Read	None	None
__ORAO__ StoreCreditTrans_c	Store Credit Transaction	Y	Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ MerchLocation_c	Merchandising Location	N	Read All, Functional Read	None	None
__ORACO__ ClaimRequest_c	Claim	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ClaimRequestItems_c	Claim Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ DeductionRequest_c	Deduction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Resolution_ c	Resolution	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Cluster_c	Clusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountCluster_c	Account Clusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__APCluster_ c	APClusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionProgram_c	Promotion Programs	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromoPgmCluster_c	PromoPgmClusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AssortmentPlan_c	Assortment Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AssortmentGroup_c	Assortment Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountCluster_c	Account Clusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__APCluster_ c	APClusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionProgram_c	Promotion Programs	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete



Object	Display Name	Create	Read	Update	Delete
__ORACO__ PromoPgmCluster_c	PromoPgmClusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AssortmentPlan_c	Assortment Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AssortmentGroup_c	Assortment Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Benefit_c	Benefit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BenefitBalanceTxn_c	Benefit Balances	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BenefitGuard_c	Benefit Guard	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccruedBenefitTxn_c	Benefit Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ComplianceHistory_c	Compliance History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Condition_ c	Condition	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ConditionComplHist_c	Condition Compliance History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ConditionGuard_c	Condition Guard	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CGContract_c	Contract	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CGContractTemplate_c	Contract Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountContract_c	Account Contract	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContractJobSched_c	Contract Job Schedule	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ ManualAccrualSched_c	Distribution Schedule	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CTemplateCluster_c	<b>CTemplateCluster</b>	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AttainmentTarget_c	Attainment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ForecastAttainment_c	Forecast Attainment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductBenefit_c	Product Benefit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ConditionProduct_c	Condition Product	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Term_c_c	Term	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchLocPlan_c	Merchandising Location Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchLocPCluster_c	Merchandising Location Plan Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchMaterialAlloc_c	Merchandising Material Allocation	Y	Read All, Functional Read	None	None
__ORACO__ MerchMaterial_c	Merchandising Material	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CGContractPrintTpt_c	Contract Print Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

For the marketing manager custom role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ AccDistributorRel_c	Account Distributor Relationship	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Budget_c	Budget	Y	Read All, Functional Read	Update All, Functional Update	N

Object	Display Name	Create	Read	Update	Delete
__ORACO__Fund_c	Fund	Y	Read All, Functional Read	Update All, Functional Update	N
__ORACO__FundAllocation_c	Fund Allocation	N	N	N	N
__ORACO__MerchMatAlocPlan_c	Allocation Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__MMAlocPlanRoute_c	<b>MM Allocation Plan Routes</b>	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AccountPromotion_c	Account Promotion	N	Read All, Functional Read	Update All, Functional Update	None
__ORACO__CGContractHistory_c	Contract History	N	Read All, Functional Read	None	None
__ORACO__AccountSurveys_c	Account Survey	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AuditHistory_c	Audit History	N	None	None	None
__ORACO__ComboGroupDSD_c	Combo Group	N	Read All, Functional Read	None	None
__ORACO__ComboGroupItemDSD_c	Combo Group Item	N	Read All, Functional Read	None	None
__ORACO__Coupon_c	Coupon	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__CouponTransaction_c	Coupon Settlement	N	Read All, Functional Read	None	None
__ORACO__CreditLineDSD_c	Credit Line	N	Read All, Functional Read	None	None
__ORACO__CreditNoteDSD_c	Credit Note	N	Read All, Functional Read	None	None
__ORACO__DistributeCentre_c	Distribution Center	N	Read All, Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ Document_c	Document	Y	Read All, Functional Read	None	None
__ORACO__Expense_c	Expense	Y	Read All, Functional Read	None	None
__ORACO__ InvAuditLineDSD_c	Inventory Audit Report	Y	Read All, Functional Read	None	None
__ORACO__Inventory_ c	Inventory	N	None	None	None
__ORACO__ InventoryAudit_c	Inventory Audit	N	Read All, Functional Read	None	None
__ORACO__ InventoryAuditDSD_c	Inventory Audit Report	Y	Read All, Functional Read	None	None
__ORACO__ InventoryAuditLine_c	Inventory Audit Line	N	Read All, Functional Read	None	None
__ORACO__ InventoryReloadDSD_c	Inventory Reload Report	Y	Read All, Functional Read	None	None
__ORACO__ InvoiceDSD_c	Invoice	N	Read All, Functional Read	None	None
__ORACO__ InvoiceLineDSD_c	Invoice Line	N	Read All, Functional Read	None	None
__ORACO__ InvReloadLineDSD_c	Inventory Reload Line	Y	Read All, Functional Read	None	None
__ORACO__ LegalEntity_c	Legal Entity	N	Read All, Functional Read	None	None
__ORACO__Order_c	Order	Y	Read All, Functional Read	Functional Update	None
__ORACO__ OrderDSD_c	Order Request	Y	Read All, Functional Read	None	None
__ORACO__ OrderItems_c	Order Item	Y	Read All, Functional Read	Functional Update	None
__ORACO__ OrderLineDSD_c	Order Line Request	Y	Read All, Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ OrderLineRollup_c	Order Line	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ OrderLStatusDSD_c	Order Line Status	N	Read All, Functional Read	None	None
__ORACO__ OrderRollup_c	Order	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ OrderStatusDSD_c	Order Status	N	Read All, Functional Read	None	None
__ORACO__ PaymentDSD_c	Payment	N	Read All, Functional Read	None	None
__ORACO__ PaymentLineDSD_c	Payment Line	N	Read All, Functional Read	None	None
__ORACO__ ProdAssortmentLine_c	Assortment Line	N	Read All, Functional Read	None	None
__ORACO__ ProductAssortment_c	Assortment	N	Read All, Functional Read	None	None
__ORACO__Route_c	Route	N	Read All, Functional Read	None	None
__ORACO__ RouteAllocation_c	Route Allocation	N	Read All, Functional Read	None	None
__ORACO__ RouteAssignHist_c	Route Assignment History	N	Read All, Functional Read	None	None
__ORACO__ RouteCheckInHist_c	Route Check In History	N	Read All, Functional Read	None	None
__ORACO__ RouteInventory_c	Route Inventory	N	None	None	None
__ORACO__ RouteInvTransDSD_c	Route Inventory Transaction	N	None	None	None
__ORACO__ RoutePresettlement_c	Route Pre-Settlement Report	Y	Read All, Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ SalesTarget_c	Sales Target	N	None	None	None
__ORACO__ ShipmentDSD_c	Shipment	N	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ ShipmentLineDSD_c	Shipment Line	N	Read All, Functional Read	None	None
__ORACO__ ShoppingCart_c	Shopping Cart	N	None	None	None
__ORACO__ ShoppingCartDSD_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ ShoppingCartItem_c	Shopping Cart Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartPromo_c	Shopping Cart Promo	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShopCartTplPlan_c	Shopping Cart Template Plan	N	Read All, Functional Read	None	None
__ORACO__ ShoppingCartTpl_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__ ShopCartTplHeadr_c	Shopping Cart Template Header	N	Read All, Functional Read	None	None
__ORACO__ SurveyTemplate_c	Survey Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionUsageTaxn_c	Promotion Usage Transaction	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ Package_c	Package	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ BankAccount_c	Bank Account	N	Read All, Functional Read	None	None
__ORACO__ ObjConfig_c	Object Configuration	N	None	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__FldConfig_c	Field Configuration	N	None	None	None
__ORACO__BankDeposit_c	Bank Deposit	N	None	None	None
__ORACO__AssortmentLineRel_c	Assortment Line Relationship	N	None	None	None
__ORACO__ContainerClass_c	Container Class	N	None	None	None
__ORACO__AccContainerClass_c	Account Container Class	N	None	None	None
__ORACO__ContainerClassBal_c	Container Class Balance	N	None	None	None
__ORACO__ContainerClassTxn_c	Container Class Transaction	N	None	None	None
__ORACO__StoreCredit_c	Store Credit	N	None	None	None
__ORACO__StoreCreditTrans_c	Store Credit Transaction	N	None	None	None
__ORACO__MerchLocation_c	Merchandising Location	N	Read All, Functional Read	None	None
__ORACO__Cluster_c	Clusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AccountCluster_c	Account Clusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__APCluster_c	APClusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PromotionProgram_c	Promotion Programs	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PromoPgmCluster_c	PromoPgmClusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__BusinessPlan_c	Business Plans	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ AccountObjTask_c	Account Objective Tasks	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountTaskDetails_c	Account Task Details	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountObjective_c	AccountObjectives	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ KPILibrary_c	KPI Libraries	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Objective_ Cluster_c	Objective_Clusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ KPIRelationship_c	KPI Relationship	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Benefit_c	Benefit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BenefitBalanceTxn_c	Benefit Balances	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BenefitGuard_c	Benefit Guard	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccruedBenefitTxn_c	Benefit Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ComplianceHistory_c	Condition	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Condition_ c	Condition	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ConditionComplHist_c	Condition Compliance History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ConditionGuard_c	Condition Guard	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CGContract_c	Contract	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete



Object	Display Name	Create	Read	Update	Delete
__ORACO__ CGContractTemplate_c	Contract Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountContract_c	Account Contract	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ContractJobSched_c	Contract Job Schedule	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ManualAccrualSched_c	Distribution Schedule	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CTemplateCluster_c	CTemplateCluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AttainmentTarget_c	Attainment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ForecastAttainment_c	Forecast Attainment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductBenefit_c	Product Benefit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ConditionProduct_c	Condition Product	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Term_c_c	Term	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CGContractPrintTpt_c	Contract Print Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ObjectMapping_c	Object Mapping	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AttributeMapping_c	Attribute Mapping	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PublishLog_c	Publishing Log	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchLocPlan_c	Merchandising Location Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ MerchLocPCLuster_c	Merchandising Location Plan Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchMaterialAlloc_c	Merchandising Material Allocation	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchMaterial_c	Merchandising Material	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

For the sales manager custom role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ AccDistributorRel_c	Account Distributor Relationship	N	Read All, Functional Read	None	None
__ORACO__ MerchMatAlocPlan_c	Allocation Plan	N	Read All, Functional Read	None	None
__ORACO__ MMAllocPlanRoute_c	<b>MM Allocation Plan Routes</b>	N	Read All, Functional Read	None	None
__ORACO__ AccountPromotion_c	Account Promotion	N	Read All, Functional Read	None	None
__ORACO__ AccountSurveys_c	Account Survey	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AuditHistory_c	Audit History	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ ComboGroupDSD_c	Combo Group	N	Read All, Functional Read	None	None
__ORACO__ ComboGroupItemDSD_c	Combo Group Item	N	Read All, Functional Read	None	None
__ORACO__ Coupon_c	Coupon	N	Read All, Functional Read	None	None
__ORACO__ CouponTransaction_c	Coupon Settlement	Y	Read All, Functional Read	None	None
__ORACO__ CreditLineDSD_c	Credit Line	N	Read All, Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ CreditNoteDSD_c	Credit Note	N	Read All, Functional Read	None	None
__ORACO__ DistributeCentre_c	Distribution Center	N	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ Document_c	Document	N	Read All, Functional Read	None	None
__ORACO__Expense_c	Expense	N	Read All, Functional Read	None	None
__ORACO__ InvAuditLineDSD_c	Inventory Audit Line	N	Read All, Functional Read	None	None
__ORACO__Inventory_ c	Inventory	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ InventoryAudit_c	Inventory Audit	N	Read All, Functional Read	None	None
__ORACO__ InventoryAuditDSD_c	Inventory Audit Report	N	Read All, Functional Read	None	None
__ORACO__ InventoryAuditLine_c	Inventory Audit Line	N	Read All, Functional Read	None	None
__ORACO__ InventoryReloadDSD_c	Inventory Reload Report	N	Read All, Functional Read	None	None
__ORACO__ InvoiceDSD_c	Invoice	Y	Read All, Functional Read	None	None
__ORACO__ InvoiceLineDSD_c	Invoice Line	Y	Read All, Functional Read	None	None
__ORACO__ InvReloadLineDSD_c	Inventory Reload Line	N	Read All, Functional Read	None	None
__ORACO__ LegalEntity_c	Legal Entity	N	Read All, Functional Read	None	None
__ORACO__Order_c	Order	Y	Read All, Functional Read	Functional Update	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ OrderDSD_c	Order Request	Y	Read All, Functional Read	None	None
__ORACO__ OrderItems_c	Order Item	Y	Read All, Functional Read	Functional Update	None
__ORACO__ OrderLineDSD_c	Order Line Request	Y	Read All, Functional Read	None	None
__ORACO__ OrderLineRollup_c	Order Line	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ OrderLStatusDSD_c	Order Line Status	N	Read All, Functional Read	None	None
__ORACO__ OrderRollup_c	Order	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ OrderStatusDSD_c	Order Status	N	Read All, Functional Read	None	None
__ORACO__ PaymentDSD_c	Payment	Y	Read All, Functional Read	None	None
__ORACO__ PaymentLineDSD_c	Payment Line	Y	Read All, Functional Read	None	None
__ORACO__ ProdAssortmentLine_c	Assortment Line	N	Read All, Functional Read	None	None
__ORACO__ ProductAssortment_c	Assortment	N	Read All, Functional Read	None	None
__ORACO__Route_c	Route	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RouteAllocation_c	Route Allocation	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RouteAssignHist_c	Route Assignment History	Y	Read All, Functional Read	None	None
__ORACO__ RouteCheckInHist_c	Route Check In History	Y	Read All, Functional Read	None	None
__ORACO__ RouteInventory_c	Route Inventory	N	Read All, Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ RouteInvTransDSD_c	Route Inventory Transaction	Y	Read All, Functional Read	None	None
__ORACO__ RoutePresettlement_c	Route Pre-Settlement Report	N	Read All, Functional Read	None	None
__ORACO__ SalesTarget_c	Sales Target	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShipmentDSD_c	Shipment	N	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ ShipmentLineDSD_c	Shipment Line	N	Read All, Functional Read	None	None
__ORACO__ ShoppingCart_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartDSD_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ ShoppingCartItem_c	Shopping Cart Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartPromo_c	Shopping Cart Promo	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartTmpI_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__ SurveyTemplate_c	Survey Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionUsageTxn_c	Promotion Usage Transaction	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ Package_c	Package	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ BankAccount_c	Bank Account	N	Read All, Functional Read	None	None
__ORACO__ ObjConfig_c	Object Configuration	N	None	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__FldConfig_c	Field Configuration	N	None	None	None
__ORACO__BankDeposit_c	Bank Deposit	N	Read All, Functional Read	None	None
__ORACO__AssortmentLineRel_c	Assortment Line Relationship	N	Read All, Functional Read	None	None
__ORACO__ContainerClass_c	Container Class	N	Read All, Functional Read	None	None
__ORACO__AccContainerClass_c	Account Container Class	N	Read All, Functional Read	None	None
__ORACO__ContainerClassBal_c	Container Class Balance	N	Read All, Functional Read	None	None
__ORACO__ContainerClassTxn_c	Container Class Transaction	N	Read All, Functional Read	None	None
__ORACO__StoreCredit_c	Store Credit	N	Read All, Functional Read	None	None
__ORACO__StoreCreditTrans_c	Store Credit Transaction	Y	Read All, Functional Read	None	None
__ORACO__MerchLocation_c	Merchandising Location	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ClaimRequest_c	Claim	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ClaimRequestItems_c	Claim Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__DeductionRequest_c	Deduction	N	Read All, Functional Read	None	None
__ORACO__Resolution_c	Resolution	N	Read All, Functional Read	None	None
__ORACO__MerchLocPlan_c	Merchandising Location Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__MerchLocPCluster_c	Merchandising Location Plan Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ MerchMaterialAlloc_c	Merchandising Material Allocation	Y	Read All, Functional Read	None	None
__ORACO__ MerchMaterial_c	Merchandising Material	Y	Read All, Functional Read	None	None
__ORACO__ ShopCartTplPlan_c	Shopping Cart Template Plan	N	Read All, Functional Read	None	None
__ORACO__ ShoppingCartTpl_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__ ShopCartTplHdr_c	Shopping Cart Template Header	N	Read All, Functional Read	None	None
__ORACO__ SurveyQuestions_c	Survey Questions	N	Read All, Functional Read	None	None

For the sales representative custom role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ BusinessPlan_c	Business Plan	N	Read All, Functional Read	N	N
__ORACO__ AccountObjTask_c	Account Objective Task	N	Read All, Functional Read	N	N
__ORACO__ AccountTaskDetails_c	Account Task Details	N	Read All, Functional Read	N	N
__ORACO__ AccountObjective_c	Account Objective	N	Read All, Functional Read	N	N
__ORACO__ KPILibrary_c	KPI Library	N	Read All, Functional Read	N	N
__ORACO__ KPIRelationship_c	KPI Relationship	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccDistributorRel_c	Account Distributor Relationship	N	Read All, Functional Read	N	N
__ORACO__ MerchMatAlocPlan_c	Allocation Plan	N	Read All, Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ MMAllocPlanRoute_c	<b>MM Allocation Plan Routes</b>	N	Read All, Functional Read	None	None
__ORACO__ ShopCartTplPlan_c	Shopping Cart Template Plan	N	Read All, Functional Read	None	None
__ORACO__ ShoppingCartTpl_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__ ShopCartTplHeadr_c	Shopping Cart Template Header	N	Read All, Functional Read	None	None
__ORACO__ AccountPromotion_c	Account Promotion	N	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ AccountSurveys_c	Account Survey	N	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ AuditHistory_c	Audit History	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ ComboGroupDSD_c	Combo Group	N	Read All, Functional Read	None	None
__ORACO__ ComboGroupItemDSD_c	Combo Group Item	N	Read All, Functional Read	None	None
__ORACO__ Coupon_c	Coupon	N	Read All, Functional Read	None	None
__ORACO__ CouponTransaction_c	Coupon Settlement	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ CreditLineDSD_c	Credit Line	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ CreditNoteDSD_c	Credit Note	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ DistributeCentre_c	Distribution Center	N	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ Document_c	Document	Y	Read All, Functional Read	Update All, Functional Update	None



Object	Display Name	Create	Read	Update	Delete
__ORACO__Expense_c	Expense	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__InvAuditLineDSD_c	Inventory Audit Line	Y	Read All, Functional Read	None	None
__ORACO__Inventory_c	Inventory	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__InventoryAudit_c	Inventory Audit	N	Read All, Functional Read	None	None
__ORACO__InventoryAuditDSD_c	Inventory Audit Report	Y	Read All, Functional Read	None	None
__ORACO__InventoryAuditLine_c	Inventory Audit Line	N	Read All, Functional Read	None	None
__ORACO__InventoryReloadDSD_c	Inventory Reload Report	Y	Read All, Functional Read	None	None
__ORACO__InvoiceDSD_c	Invoice	Y	Read All, Functional Read	None	None
__ORACO__InvoiceLineDSD_c	Invoice Line	Y	Read All, Functional Read	None	None
__ORACO__InvReloadLineDSD_c	Inventory Reload Line	Y	Read All, Functional Read	None	None
__ORACO__LegalEntity_c	Legal Entity	N	Read All, Functional Read	None	None
__ORACO__Order_c	Order	Y	Read All, Functional Read	Functional Update	None
__ORACO__OrderDSD_c	Order Request	Y	Read All, Functional Read	None	None
__ORACO__OrderItems_c	Order Item	Y	Read All, Functional Read	Functional Update	None
__ORACO__OrderLineDSD_c	Order Line Request	Y	Read All, Functional Read	None	None
__ORACO__OrderLineRollup_c	Order Line	Y	Read All, Functional Read	Update All, Functional Update	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ OrderLStatusDSD_c	Order Line Status	N	Read All, Functional Read	None	None
__ORACO__ OrderRollup_c	Order	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ OrderStatusDSD_c	Order Status	N	Read All, Functional Read	None	None
__ORACO__ PaymentDSD_c	Payment	Y	Read All, Functional Read	None	None
__ORACO__ PaymentLineDSD_c	Payment Line	Y	Read All, Functional Read	None	None
__ORACO__ ProdAssortmentLine_c	Assortment Line	N	Read All, Functional Read	None	None
__ORACO__ ProductAssortment_c	Assortment	N	Read All, Functional Read	None	None
__ORACO__Route_c	Route	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ RouteAllocation_c	Route Allocation	N	Read All, Functional Read	None	None
__ORACO__ RouteAssignHist_c	Route Assignment History	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ RouteCheckInHist_c	Route Check In History	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ RouteInventory_c	Route Inventory	N	Read All, Functional Read	None	None
__ORACO__ RouteInvTransDSD_c	Route Inventory Transaction	Y	Read All, Functional Read	None	None
__ORACO__ RoutePresettlement_c	Route Pre-Settlement Report	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ SalesTarget_c	Sales Target	N	Read All, Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ ShipmentDSD_c	Shipment	N	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ ShipmentLineDSD_c	Shipment Line	N	Read All, Functional Read	None	None
__ORACO__ ShoppingCart_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartDSD_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ ShoppingCartItem_c	Shopping Cart Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartPromo_c	Shopping Cart Promo	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ShoppingCartTpl_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__ SurveyTemplate_c	Survey Template	N	Read All, Functional Read	None	None
__ORACO__ PromotionUsageTxn_c	Promotion Usage Transaction	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ Package_c	Package	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ BankAccount_c	Bank Account	N	Read All, Functional Read	None	None
__ORACO__ ObjConfig_c	Object Configuration	N	None	None	None
__ORACO__ FldConfig_c	Field Configuration	N	None	None	None
__ORACO__ BankDeposit_c	Bank Deposit	Y	Read All, Functional Read	None	None
__ORACO__ AssortmentLineRel_c	Assortment Line Relationship	N	Read All, Functional Read	None	None
__ORACO__ ContainerClass_c	Container Class	N	Read All, Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ AccContainerClass_c	Account Container Class	N	Read All, Functional Read	None	None
__ORACO__ ContainerClassBal_c	Container Class Balance	N	Read All, Functional Read	None	None
__ORACO__ ContainerClassTxn_c	Container Class Transaction	Y	Read All, Functional Read	None	None
__ORACO__ StoreCredit_c	Store Credit	N	Read All, Functional Read	None	None
__ORACO__ StoreCreditTrans_c	Store Credit Transaction	Y	Read All, Functional Read	None	None
__ORACO__ MerchLocation_c	Merchandising Location	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ClaimRequest_c	Claim	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ClaimRequestItems_c	Claim Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ DeductionRequest_c	Deduction	N	Read All, Functional Read	None	None
__ORACO__ CGContractHistory_c	Contract History	N	Read All, Functional Read	None	None
__ORACO__Resolution_c	Resolution	N	Read All, Functional Read	None	None
__ORACO__ MerchLocPlan_c	Merchandising Location Plan	N	Read All, Functional Read	None	None
__ORACO__ MerchLocPCluster_c	Merchandising Location Plan Cluster	N	Read All, Functional Read	None	None
__ORACO__Team_c	Team	N	Read All, Functional Read	None	None
__ORACO__ InventoryTeam_c	Inventory Team	N	Read All, Functional Read	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ TeamResource_c	Team Resource	N	Read All, Functional Read	None	None
__ORACO__ SurveyQuestions_c	Survey Questions	N	Read All, Functional Read	None	None

For the sales administrator custom role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ Manufacturer_c	Manufacturer	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ManufacturerToTeam_c	Manufacturer Team	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ DetailingPrdGrp_c	Detailing Product Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ DetailingGroupTeam_c	Detailing Group Team	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductDetailing_c	Product Detailing	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PrintDocument_c	Print Document	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ TemplateFile_c	Print Template File	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchLocPlan_c	Merchandising Location Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchLocPCluster_c	Merchandising Location Plan Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountPromotion_c	Account Promotion	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountSurveys_c	Account Survey	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AuditHistory_c	Audit History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ ComboGroupDSD_c	Combo Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ComboGroupItemDSD_c	Combo Group Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Coupon_c	Coupon	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CouponTransaction_c	Coupon Settlement	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CreditLineDSD_c	Credit Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CreditNoteDSD_c	Credit Note	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ DistributeCentre_c	Distribution Center	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Document_c	Document	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Expense_c	Expense	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ InvAuditLineDSD_c	Inventory Audit Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Inventory_c	Inventory	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ InventoryAudit_c	Inventory Audit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ InventoryAuditDSD_c	Inventory Audit Report	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ InventoryAuditLine_c	Inventory Audit Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ InventoryReloadDSD_c	Inventory Reload Report	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ InvoiceDSD_c	Invoice	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ InvoiceLineDSD_c	Invoice Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ InvReloadLineDSD_c	Inventory Reload Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ LegalEntity_c	Legal Entity	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Order_c	Order	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderDSD_c	Order Request	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderItems_c	Order Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderLineDSD_c	Order Line Request	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderLineRollup_c	Order Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderLStatusDSD_c	Order Line Status	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderRollup_c	Order	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ OrderStatusDSD_c	Order Status	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PaymentDSD_c	Payment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PaymentLineDSD_c	Payment Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProdAssortmentLine_c	Assortment Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductAssortment_c	Assortment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__Route_c	Route	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__RouteAllocation_c	Route Allocation	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__RouteAssignHist_c	Route Assignment History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__RouteCheckInHist_c	Route Check In History	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__RouteInventory_c	Route Inventory	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__RouteInvTransDSD_c	Route Inventory Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__RoutePresettlement_c	Route Pre-Settlement Report	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__SalesTarget_c	Sales Target	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ShipmentDSD_c	Shipment	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ShipmentLineDSD_c	Shipment Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ShoppingCart_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ShoppingCartDSD_c	Shopping Cart	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ShoppingCartItem_c	Shopping Cart Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ShoppingCartPromo_c	Shopping Cart Promo	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ShopCartTplPlan_c	Shopping Cart Template Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete



Object	Display Name	Create	Read	Update	Delete
__ORACO__ShoppingCartTmpI_c	Shopping Cart Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ShopCartTmplHeadr_c	Shopping Cart Template Header	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__SurveyTemplate_c	Survey Template	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PromotionUsageTxn_c	Promotion Usage Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Package_c	Package	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__BankAccount_c	Bank Account	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ObjConfig_c	Objective Configuration	N	Read All, Functional Read	None	None
__ORACO__FldConfig_c	Field Configuration	N	Read All, Functional Read	Update All, Functional Update	None
__ORACO__BankDeposit_c	Bank Deposit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AssortmentLineRel_c	Assortment Line Relationship	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ContainerClass_c	Container Class	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AccContainerClass_c	Account Container Class	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ContainerClassBal_c	Container Class Balance	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ContainerClassTxn_c	Container Class Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__StoreCredit_c	Store Credit	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__StoreCreditTrans_c	Store Credit Transaction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ MerchLocation_c	Merchandising Location	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ClaimRequest_c	Claim	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ClaimRequestItems_c	Claim Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ DeductionRequest_c	Deduction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Resolution_ c	Resolution	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ObjectMapping_c	Object Mapping	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AttributeMapping_c	Attribute Mapping	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PublishLog_c	Publishing Log	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchMaterialAlloc_c	Merchandising Material Allocation	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ MerchMaterial_c	Merchandising Material	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ CGContractHistory_c	Contract History	Y	Read All, Functional Read	None	None
__ORACO__ BusinessPlan_c	Business Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountObjTask_c	Account Objective Task	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountTaskDetails_c	Account Task Details	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ObjectiveAccount_c	Objective Account	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ KPILibrary_c	KPI Library	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Objective_ Cluster_c	Objective Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ KPIRelationship_c	KPI Relationship	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ SurveyQuestions_c	Survey Questions	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ObjAttribute_c	Object Attribute	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ObjConfig_c	Object Configuration	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ FilterCriteriaGrp_c	Filter Criteria Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ FilterCriteria_c	Filter Criteria	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__SyncRule_ c	Sync Rule	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__SyncField_ c	Sync Field	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

For the consumer goods cashier role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ MerchMatAlocPlan_c	Allocation Plan	N	Read All, Functional Read	None	None
__ORACO__ MMAllocPlanRoute_c	<b>MM Allocation Plan Routes</b>	N	Read All, Functional Read	None	None
__ORACO__ PrintDocument_c	Print Document	N	Read All, Functional Read	N	N
__ORACO__ TemplateFile_c	Print Template File	N	Read All, Functional Read	N	N

Object	Display Name	Create	Read	Update	Delete
__ORACO__ShopCartTplPlan_c	Shopping Cart Template Plan	N	Read All, Functional Read	None	None
__ORACO__ShoppingCartTpl_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__ShopCartTplHeadr_c	Shopping Cart Template Header	N	Read All, Functional Read	None	None
__ORACO__AccountPromotion_c	Account Promotion	N	None	None	None
__ORACO__AccountSurveys_c	Account Survey	N	None	None	None
__ORACO__AuditHistory_c	Audit History	N	None	None	None
__ORACO__ComboGroupDSD_c	Combo Group	N	None	None	None
__ORACO__ComboGroupItemDSD_c	Combo Group Item	N	None	None	None
__ORACO__Coupon_c	Coupon	N	Read All, Functional Read	None	None
__ORACO__CouponTransaction_c	Coupon Settlement	N	Read All, Functional Read	Functional Update	None
__ORACO__CreditLineDSD_c	Credit Line	N	Read All, Functional Read	None	None
__ORACO__CreditNoteDSD_c	Credit Note	N	Read All, Functional Read	None	None
__ORACO__DistributeCentre_c	Distribution Center	N	Read All, Functional Read	None	None
__ORACO__Document_c	Document	N	Read All, Functional Read	Functional Update	None
__ORACO__Expense_c	Expense	N	Read All, Functional Read	Functional Update	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ InvAuditLineDSD_c	Inventory Audit Line	N	None	None	None
__ORACO__Inventory_ c	Inventory	N	None	None	None
__ORACO__ InventoryAudit_c	Inventory Audit	N	None	None	None
__ORACO__ InventoryAuditDSD_c	Inventory Audit Report	N	None	None	None
__ORACO__ InventoryAuditLine_c	Inventory Audit Line	N	None	None	None
__ORACO__ InventoryReloadDSD_c	Inventory Reload Report	N	None	None	None
__ORACO__ InvoiceDSD_c	Invoice	N	Read All, Functional Read	None	None
__ORACO__ InvoiceLineDSD_c	Invoice Line	N	Read All, Functional Read	None	None
__ORACO__ InvReloadLineDSD_c	Inventory Reload Line	N	None	None	None
__ORACO__ LegalEntity_c	Legal Entity	N	Read All, Functional Read	None	None
__ORACO__Order_c	Order	N	None	None	None
__ORACO__ OrderDSD_c	Order Request	N	None	None	None
__ORACO__ OrderItems_c	Order Item	N	None	None	None
__ORACO__ OrderLineDSD_c	Order Line Request	N	None	None	None
__ORACO__ OrderLineRollup_c	Order Line	N	None	None	None
__ORACO__ OrderLStatusDSD_c	Order Line Status	N	None	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ OrderRollup_c	Order	N	None	None	None
__ORACO__ OrderStatusDSD_c	Order Status	N	None	None	None
__ORACO__ PaymentDSD_c	Payment	N	Read All, Functional Read	None	None
__ORACO__ PaymentLineDSD_c	Payment Line	N	Read All, Functional Read	None	None
__ORACO__ ProdAssortmentLine_c	Assortment Line	N	None	None	None
__ORACO__ ProductAssortment_c	Assortment	N	None	None	None
__ORACO__Route_c	Route	N	Read All, Functional Read	None	None
__ORACO__ RouteAllocation_c	Route Allocation	N	Read All, Functional Read	None	None
__ORACO__ RouteAssignHist_c	Route Assignment History	N	Read All, Functional Read	None	None
__ORACO__ RouteCheckInHist_c	Route Check In History	N	Read All, Functional Read	None	None
__ORACO__ RouteInventory_c	Route Inventory	N	None	None	None
__ORACO__ RouteInvTransDSD_c	Route Inventory Transaction	N	None	None	None
__ORACO__ RoutePresettlement_c	Route Pre-Settlement Report	N	Read All, Functional Read	Functional Update	None
__ORACO__ SalesTarget_c	Sales Target	N	None	None	None
__ORACO__ ShipmentDSD_c	Shipment	N	None	None	None
__ORACO__ ShipmentLineDSD_c	Shipment Line	N	None	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ShoppingCart_c	Shopping Cart	N	None	None	None
__ORACO__ShoppingCartDSD_c	Shopping Cart	N	None	None	None
__ORACO__ShoppingCartItem_c	Shopping Cart Item	N	None	None	None
__ORACO__ShoppingCartPromo_c	Shopping Cart Promo	N	None	None	None
__ORACO__ShoppingCartTpl_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__SurveyTemplate_c	Survey Template	N	None	None	None
__ORACO__PromotionUsageTxn_c	Promotion Usage Transaction	N	None	None	None
__ORACO__Package_c	Package	N	None	None	None
__ORACO__BankAccount_c	Bank Account	N	Read All, Functional Read	None	None
__ORACO__ObjConfig_c	Object Configuration	N	None	None	None
__ORACO__FldConfig_c	Field Configuration	N	None	None	None
__ORACO__StoreCredit_c	Store Credit	N	None	None	None
__ORACO__StoreCreditTrans_c	Store Credit Transaction	N	None	None	None
__ORACO__BankDeposit_c	Bank Deposit	N	Read All, Functional Read	None	None
__ORACO__AssortmentLineRel_c	Assortment Line Relationship	N	None	None	None
__ORACO__ContainerClass_c	Container Class	N	None	None	None

Object	Display Name	Create	Read	Update	Delete
__ORACO__ AccContainerClass_c	Account Container Class	N	None	None	None
__ORACO__ ContainerClassBal_c	Container Class Balance	N	None	None	None
__ORACO__ ContainerClassTxn_c	Container Class Transaction	N	None	None	None
__ORACO__ MerchLocation_c	Merchandising Location	N	None	None	None
__ORACO__ CGContractHistory_c	Contract History	N	None	None	None
__ORACO__ Team_c	Team	N	Read All, Functional Read	None	None
__ORACO__ InventoryTeam_c	Inventory Team	N	Read All, Functional Read	None	None
__ORACO__ TeamResource_c	Team Resource	N	Read All, Functional Read	None	None
__ORACO__ MerchMaterialAlloc_c	Merchandising Material Allocation	N	Read All, Functional Read	None	None
__ORACO__ MerchMaterial_c	Merchandising Material	N	Read All, Functional Read	None	None

For the Partner Administrator Custom Role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ ClaimRequest_c	Claim	Y	Functional Read	Functional Update	Functional Delete
__ORACO__ ClaimRequestItems_c	Claim Item	Y	Read All, Functional Read	Update All, Functional Update	None
__ORACO__ DeductionRequest_c	Deduction	N	Functional Read	None	None
__ORACO__ Resolution_c	Resolution	N	None	None	None



Object	Display Name	Create	Read	Update	Delete
__ORACO__ShopCartTplPlan_c	Shopping Cart Template Plan	N	Read All, Functional Read	None	None
__ORACO__ShoppingCartTpl_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__ShopCartTplHeadr_c	Shopping Cart Template Header	N	Read All, Functional Read	None	None

For the Partner Sales Manager Custom Role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ClaimRequest_c	Claim	Y	Functional Read	Functional Update	Functional Delete
__ORACO__ClaimRequestItems_c	Claim Item	Y	Read All	Update All, Functional Update	None
__ORACO__DeductionRequest_c	Deduction	N	Functional Read	None	None
__ORACO__Resolution_c	Resolution	N	None	None	None
__ORACO__ShopCartTplPlan_c	Shopping Cart Template Plan	N	Read All, Functional Read	None	None
__ORACO__ShoppingCartTpl_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__ShopCartTplHeadr_c	Shopping Cart Template Header	N	Read All, Functional Read	None	None

For the Channel Operations Manager Custom Role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ClaimRequest_c	Claim	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ClaimRequestItems_c	Claim Item	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__DeductionRequest_c	Deduction	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Resolution_c	Resolution	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ShopCartTplPlan_c	Shopping Cart Template Plan	N	Read All, Functional Read	None	None
__ORACO__ShoppingCartTpl_c	Shopping Cart Template	N	Read All, Functional Read	None	None
__ORACO__ShopCartTplHdr_c	Shopping Cart Template Header	N	Read All, Functional Read	None	None

### Non-Administrator Roles

For all non-administrator roles such as cashier and sales representative, you have only read and read all permissions:

- \_\_ORACO\_\_ObjAttribute\_c
- \_\_ORACO\_\_ObjConfig\_c
- \_\_ORACO\_\_FilterCriteriaGrp\_c
- \_\_ORACO\_\_FilterCriteria\_c
- \_\_ORACO\_\_SyncRule\_c
- \_\_ORACO\_\_SyncField\_c

## For the Sales Application

To set up the role specific security privileges for the sales application, perform the following steps:

1. Sign in as the administrator user and navigate to **Application Composer**.

**Note:** Ensure that the administrator user has been assigned the customer manager relationship management application administrator role.

2. Select **Sales** application from the drop-down list.
3. Select **Role Security** from the Sales setup.
4. Set the roles for account manager custom, marketing manager custom, sales manager custom, sales representative custom, and sales administrator custom as provided in the following tables:

For the custom objects administration role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__AccountCluster_c	Account Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ AccrualRules_c	Accrual Rules	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ActivityTasks_c	Activity Tasks	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ActivityType_c	Activity Type	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__APCluster_ c	APCluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AssortmentGroup_c	Assortment Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AssortmentPlan_c	Assortment Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BudgetPartner_c	Budget Partner	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Cluster_c	Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ DiscountRangeDSD_c	Discount Range DSD	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PdtGroupOrderLine_c	Product Group Order Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PriorityGroup_c	Priority Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PriorityPortfolio_c	Priority Portfolio	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProgramGroup_c	Program Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProgramProduct_c	Program Product	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromoPgmCluster_c	Promotion Program Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ Promotion_c	Promotion	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ PromotionGroup_c	Promotion Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionProduct_c	Promotion Product	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionProgram_c	Promotion Program	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionProgram_c	Promotion Program	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionRevenue_c	Promotion Revenue	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionSurvey_c	Promotion Survey	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromoTradeFund_c	Promo Trade Fund	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RuleAssortments_c	Rule Assortments	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RuleProductGroups_c	Rule Product Groups	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RuleProducts_c	Rule Products	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreVisitTask_c	Store Visit Task	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreVisitTasks_c	Store Visit Tasks	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ TradeFund_c	Trade Fund	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductGroup_c	Product Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductGroupPdt_c	Product Group Product	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

For the account manager custom role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ Manufacturer_c	Manufacturer	N	Read All, Functional Read	N	N
__ORACO__ ManufacturerToTeam_ c	Manufacturer Team	N	Read All, Functional Read	N	N
__ORACO__ DetailingPrdGrp_c	Detailing Product Group	N	Read All, Functional Read	N	N
__ORACO__ DetailingGroupTeam_c	Detailing Group Team	N	Read All, Functional Read	N	N
__ORACO__ ProductDetailing_c	Product Detailing	N	Read All, Functional Read	N	N
__ORACO__ PromotionProgram_c	Promotion Program	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ TradeFund_c	Trade Fund	N	Read All, Functional Read	Update All, Functional Update	N
__ORACO__ Promotion_c	Promotion	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionSurvey_c	Promotion Survey	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionProduct_c	Promotion Product	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromoTradeFund_c	Promo Trade Fund	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProgramProduct_c	Program Product	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProgramGroup_c	Program Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ActivityTasks_c	Activity Tasks	N	Read All, Functional Read	N	N
__ORACO__ ActivityType_c	Activity Type	N	Read All, Functional Read	N	N

Object	Display Name	Create	Read	Update	Delete
__ORACO__ PromotionRevenue_c	Promotion Revenue	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreVisitTasks_c	Store Visit Tasks	N	N	N	N
__ORACO__ StoreVisitTask_c	Store Visit Task	N	N	N	N
__ORACO__ DiscountRangeDSD_c	Discount Range DSD	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionGroup_c	Promotion Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PriorityPortfolio_c	Priority Portfolio	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PriorityGroup_c	Priority Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductGroup_c	Product Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductGroupPdt_c	Product Group Pdt	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PdtGroupOrderLine_c	PdtGroup Order Line	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BudgetPartner_c	Budget Partner	N	N	N	N
__ORACO__ AccrualRules_c	Accrual Rules	N	N	N	N
__ORACO__ RuleAssortments_c	Rule Assortments	N	N	N	N
__ORACO__ RuleProductGroups_c	Rule Product Groups	N	N	N	N
__ORACO__ RuleProducts_c	Rule Products	N	N	N	N

Object	Display Name	Create	Read	Update	Delete
__ORACO__Cluster_c	Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AccountCluster_c	Account Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__APCluster_c	AP Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PromotionProgram_c	Promotion Program	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PromoPgmCluster_c	Promotion Program Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AssortmentPlan_c	Assortment Plan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__AssortmentGroup_c	Assortment Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

For the marketing manager custom role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__PromotionProgram_c	Promotion Program	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__TradeFund_c	TradeFund	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Promotion_c	Promotion	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PromotionSurvey_c	PromotionSurvey	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PromotionProduct_c	PromotionProduct	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PromoTradeFund_c	PromoTradeFund	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ProgramProduct_c	ProgramProduct	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ ProgramGroup_c	ProgramGroup	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ActivityTasks_c	Activity Tasks	N	Read All, Functional Read	N	N
__ORACO__ ActivityType_c	Activity Type	N	Read All, Functional Read	N	N
__ORACO__ PromotionRevenue_c	Promotion Revenue	N	N	N	N
__ORACO__ StoreVisitTasks_c	Store Visit Tasks	N	N	N	N
__ORACO__ StoreVisitTask_c	Store Visit Task	N	Read All, Functional Read	N	N
__ORACO__ DiscountRangeDSD_c	Discount Range DSD	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionGroup_c	Promotion Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PriorityPortfolio_c	Priority Portfolio	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PriorityGroup_c	Priority Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductGroup_c	Product Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductGroupPdt_c	Product Group Products	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PdtGroupOrderLine_c	Product Group Order Lines	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BudgetPartner_c	Budget Partner	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccrualRules_c	Accrual Rules	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RuleAssortments_c	Rule Assortments	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete



Object	Display Name	Create	Read	Update	Delete
__ORACO__ RuleProductGroups_c	Rule Product Groups	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RuleProducts_c	Rule Products	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Cluster_c	Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountCluster_c	Account Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__APCluster_ c	APCluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionProgram_c	PromotionProgram	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromoPgmCluster_c	Promo Program Clusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AssortmentPlan_c	AssortmentPlan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AssortmentGroup_c	AssortmentGroup	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BusinessPlan_c	BusinessPlan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountObjTask_c	AccountObjTask	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountTaskDetails_c	Account Task Details	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountObjective_c	Account Objective	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ KPILibrary_c	KPI Library	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Objective_ Cluster_c	Objective cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

For the sales manager custom role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ PromotionProgram_c	Promotion Program	N	Read All, Functional Read	N	N
__ORACO__ TradeFund_c	TradeFund	N	Read All, Functional Read	N	N
__ORACO__ Promotion_c	Promotion	N	Read All, Functional Read	N	N
__ORACO__ PromotionSurvey_c	PromotionSurvey	N	Read All, Functional Read	N	N
__ORACO__ PromotionProduct_c	PromotionProduct	N	Read All, Functional Read	N	N
__ORACO__ PromoTradeFund_c	PromoTradeFund	N	Read All, Functional Read	N	N
__ORACO__ ProgramProduct_c	ProgramProduct	N	Read All, Functional Read	N	N
__ORACO__ ProgramGroup_c	ProgramGroup	N	Read All, Functional Read	N	N
__ORACO__ ActivityTasks_c	Activity Tasks	N	Read All, Functional Read	N	N
__ORACO__ ActivityType_c	Activity Type	N	Read All, Functional Read	N	N
__ORACO__ PromotionRevenue_c	Promotion Revenue	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreVisitTasks_c	Store Visit Tasks	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreVisitTask_c	Store Visit Task	N	Read All, Functional Read	N	N
__ORACO__ DiscountRangeDSD_c	Discount Range DSD	N	Read All, Functional Read	N	N
__ORACO__ PromotionGroup_c	Promotion Group	N	Read All, Functional Read	N	N

Object	Display Name	Create	Read	Update	Delete
__ORACO__ PriorityPortfolio_c	Priority Portfolio	N	Read All, Functional Read	N	N
__ORACO__ PriorityGroup_c	Priority Group	N	Read All, Functional Read	N	N
__ORACO__ ProductGroup_c	Product Group	N	Read All, Functional Read	N	N
__ORACO__ ProductGroupPdt_c	Product Group Products	N	Read All, Functional Read	N	N
__ORACO__ PdtGroupOrderLine_c	Product Group Order Lines	N	Read All, Functional Read	N	N
__ORACO__ BudgetPartner_c	Budget Partner	N	N	N	N
__ORACO__ AccrualRules_c	Accrual Rules	N	N	N	N
__ORACO__ RuleAssortments_c	Rule Assortments	N	N	N	N
__ORACO__ RuleProductGroups_c	Rule Product Groups	N	N	N	N
__ORACO__ RuleProducts_c	Rule Products	N	N	N	N
__ORACO__Cluster_c	Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountCluster_c	Account Cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__APCluster_c	APCluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionProgram_c	PromotionProgram	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromoPgmCluster_c	Promo Program Clusters	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AssortmentPlan_c	AssortmentPlan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ AssortmentGroup_c	AssortmentGroup	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

For the sales representative custom role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__ SynopsisReport_c	Synopsis Report	N	Read All, Functional Read	N	N
__ORACO__ PrintDocument_c	Print Document	N	Read All, Functional Read	N	N
__ORACO__ TemplateFile_c	Print Template File	N	Read All, Functional Read	N	N
__ORACO__ PromotionProgram_c	Promotion Program	N	Read All, Functional Read	N	N
__ORACO__ TradeFund_c	TradeFund	N	Read All, Functional Read	N	N
__ORACO__ Promotion_c	Promotion	N	Read All, Functional Read	N	N
__ORACO__ PromotionSurvey_c	PromotionSurvey	N	Read All, Functional Read	N	N
__ORACO__ PromotionProduct_c	PromotionProduct	N	Read All, Functional Read	N	N
__ORACO__ PromoTradeFund_c	PromoTradeFund	N	Read All, Functional Read	N	N
__ORACO__ ProgramProduct_c	ProgramProduct	N	Read All, Functional Read	N	N
__ORACO__ ProgramGroup_c	ProgramGroup	N	Read All, Functional Read	N	N
__ORACO__ ActivityTasks_c	Activity Tasks	N	Read All, Functional Read	N	N
__ORACO__ ActivityType_c	Activity Type	N	Read All, Functional Read	N	N

Object	Display Name	Create	Read	Update	Delete
__ORACO__ PromotionRevenue_c	Promotion Revenue	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreVisitTasks_c	Store Visit Tasks	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreVisitTask_c	Store Visit Task	N	Read All, Functional Read	N	N
__ORACO__ DiscountRangeDSD_c	Discount Range DSD	N	Read All, Functional Read	N	N
__ORACO__ PromotionGroup_c	Promotion Group	N	Read All, Functional Read	N	N
__ORACO__ PriorityPortfolio_c	Priority Portfolio	N	Read All, Functional Read	N	N
__ORACO__ PriorityGroup_c	Priority Group	N	Read All, Functional Read	N	N
__ORACO__ ProductGroup_c	Product Group	N	Read All, Functional Read	N	N
__ORACO__ ProductGroupPdt_c	Product Group Products	N	Read All, Functional Read	N	N
__ORACO__ PdtGroupOrderLine_c	Product Group Order Lines	N	Read All, Functional Read	N	N
__ORACO__ BudgetPartner_c	Budget Partner	N	N	N	N
__ORACO__ AccrualRules_c	Accrual Rules	N	N	N	N
__ORACO__ RuleAssortments_c	Rule Assortments	N	N	N	N
__ORACO__ RuleProductGroups_c	Rule Product Groups	N	N	N	N
__ORACO__ RuleProducts_c	Rule Products	N	N	N	N

Object	Display Name	Create	Read	Update	Delete
__ORACO__Cluster_c	Cluster	N	Read All, Functional Read	N	N
__ORACO__AccountCluster_c	Account Cluster	N	Read All, Functional Read	N	N
__ORACO__APCluster_c	APCluster	N	Read All, Functional Read	N	N
__ORACO__PromotionProgram_c	PromotionProgram	N	Read All, Functional Read	N	N
__ORACO__PromoPgmCluster_c	Promo Program Clusters	N	Read All, Functional Read	N	N
__ORACO__AssortmentPlan_c	AssortmentPlan	N	Read All, Functional Read	N	N
__ORACO__AssortmentGroup_c	AssortmentGroup	N	Read All, Functional Read	N	N

For the sales administrator custom role:

Object	Display Name	Create	Read	Update	Delete
__ORACO__PromotionProgram_c	Promotion Program	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__TradeFund_c	Trade Fund	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Promotion_c	Promotion	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PromotionSurvey_c	Promotion Survey	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PromotionProduct_c	Promotion Product	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__PromoTradeFund_c	Promo Trade Fund	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ProgramProduct_c	Program Product	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ ProgramGroup_c	Program Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ActivityTasks_c	Activity Tasks	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ActivityType_c	Activity Type	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionRevenue_c	Promotion Revenue	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreVisitTasks_c	Store Visit Tasks	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ StoreVisitTask_c	Store Visit Task	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ DiscountRangeDSD_c	Discount Range DSD	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PromotionGroup_c	Promotion Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PriorityPortfolio_c	Priority Portfolio	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PriorityGroup_c	Priority Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductGroup_c	Product Group	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ ProductGroupPdt_c	Product Group Products	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ PdtGroupOrderLine_c	Product Group Order Lines	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ BudgetPartner_c	Budget Partner	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccrualRules_c	Accrual Rules	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RuleAssortments_c	Rule Assortments	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete

Object	Display Name	Create	Read	Update	Delete
__ORACO__ RuleProductGroups_c	Rule Product Groups	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ RuleProducts_c	Rule Products	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Cluster_c	Cluster	N	Read All, Functional Read	N	N
__ORACO__ AccountCluster_c	Account Cluster	N	Read All, Functional Read	N	N
__ORACO__APCluster_ c	APCluster	N	Read All, Functional Read	N	N
__ORACO__ PromotionProgram_c	PromotionProgram	N	Read All, Functional Read	N	N
__ORACO__ PromoPgmCluster_c	Promo Program Clusters	N	Read All, Functional Read	N	N
__ORACO__ AssortmentPlan_c	AssortmentPlan	N	Read All, Functional Read	N	N
__ORACO__ AssortmentGroup_c	AssortmentGroup	N	Read All, Functional Read	N	N
__ORACO__ BusinessPlan_c	BusinessPlan	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountObjTask_c	AccountObjTask	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountTaskDetails_c	Account Task Details	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ AccountObjective_c	Account Objective	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__ KPILibrary_c	KPI Library	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete
__ORACO__Objective_ Cluster_c	Objective cluster	Y	Read All, Functional Read	Update All, Functional Update	Delete All, Functional Delete



**Note:** For Contracts, all roles other than cashier have same permissions.

### Account KPI

All administrators roles have permissions to read, update, create, delete, read all, update all, and delete all for \_\_ORACO\_\_KPIRelationship\_c.

### Administrator Roles

Administrators roles have permissions to read, update, create, delete, read all, update all, and delete all.

### Non-Administrator Roles

For all non-administrator roles such as cashier and sales representative, you have only read and read all permissions:

- \_\_ORACO\_\_AccountObjTask\_c
- \_\_ORACO\_\_StoreVisitTasks\_c
- \_\_ORACO\_\_Manufacturer\_c
- \_\_ORACO\_\_DetailingPrdGrp\_c
- \_\_ORACO\_\_DetailingGroupTeam\_c
- \_\_ORACO\_\_ProductDetailing\_c
- \_\_ORACO\_\_SynopsisReport\_c
- \_\_ORACO\_\_ManufacturerToTeam\_c
- \_\_ORACO\_\_PrintTplClustr\_c



# 8 Sync Rules

## Configure Data Sync for Offline Application

As an administrator or implementor, you can optimize the offline mobile experience by configuring the objects and data for offline sync. By marking the appropriate subset of the data objects, you can manage the sync routines and improve the efficiency of the field operations.

- Define the objects, attributes, and records for sync.
- Use the filters to determine the data set for download.
- Balance the data needs with the device memory constraints.
- Enable download of the required data to suit the needs of your organization.
- Manage offline data objects and records based on user security and privileges.
- Improve the offline experience of the mobile application and device.

### Prerequisites

Run the **Enable Consumer Goods Object Extension for the Mobile Application** job to generate the seeded sync rules. For more information, see [Run the ESS Jobs](#).

**Note:** You must run this scheduled process job to see the seeded rules.

### Create Sync Rule

To improve the overall mobile application experience, configure the data sets, objects, and attributes to filter the information required for managing the store visits routines. You can configure the objects related to the active contracts, select attributes, and filter the records for offline sync. As a sales administrator, here's how you create a sync rule:

1. On the springboard, go to **Sync Rules > Create**.
2. Specify the values for the fields such as the rule name, object, parent object, and sync settings details.
3. Click **Save and Close**.
4. Go to the **Object Attributes** subtab.
5. Search and select an object attribute from the list and click **Save** to map attributes to the sync rule.
6. Go to **Filter Criteria Group > Create**.
7. Specify the group name, filter operation such as **And** or **Or**. You can have multiple filter criteria groups.
8. On the Filter Criteria Group summary page, go to **Filter Criterion > Create**.
9. Specify the criterion name, type, filter operation, and values from the available list.

**Note:** Based on your selection, you can use various types and filters.

For example, for the date type, you can use the following filters:

- Operations: **After**, **Before**, **Between**, **=**, **>**, **>=**, **<**, **<=**, **!=**, **Is**.

- o Values: `Today`, `Today-1D`, `Today+1D`, `Today-1M`, `Today+1M`, `Today-1Y`, `Today+1Y`, `(YYYY-MM-DD HH24:MI)`, and `Blank`.

D is day, M is month, and Y is year.

10. Click **Save and Close**.

You can view the Sync rule.

## Sync Rule: Use Cases

Here are a few samples that you can use as sync rules and publish the data to your offline mobile application.

1. On the springboard, go to **Sync Rules > Find**.
2. Search for the objects related to your requirements, for example, **CGContract\_c**.

You can apply sync rules for both seeded and custom objects.

3. On the sync rule summary page, see the rule name, object, parent object, and other details. Ensure you select the **Sync** option.
4. Go to **Filter Criteria Group > Filter Criterion**.

Verify the group name, filter operation such as **And** or **Or**. Select the operations to suit your filter criteria groups.

5. On **Filter Criterion** subtab, specify the filter criteria name, and the following type, operation, and values from the available list.

- o **For active contracts:**

Use the following sync rules to filter out the required contracts information. You can configure the objects related to the active contracts, select attributes, and filter the records for offline sync.

- i. Specify the criteria name, search and select the field **\_\_ORACO\_Status\_c**.
- ii. Select `Picklist` from the **Type** drop-down list and specify **In** from **Filter Operation** list.
- iii. Specify **ACTIVE** in the value field.
- iv. Click **Save and Close**.

This filter criterion downloads the objects with the active contracts to your mobile app.

- o **For store visits and activity:**

Use the following sync rules to help you with the activity for today and next two days:

- i. Create multiple criteria by specifying the criteria name, search and select the field **ActivityStartDate**.
  - o Select the **Date** from the available Type list, specify the filters **>=** from Filter Operation list, and specify **Today** in the value field
  - o Select the **Date** from the available Type list, specify the filters **<=** from Filter Operation list, and specify **Today+2D** in the value field
- ii. Create another criterion by specifying the criteria name, search and select the field **\_\_ORACO\_StoreVisit\_c**.
  - o Select `checkbox` from the **Type**, specify the filters **=** from Filter Operation list, and specify **Y** in the value field
- iii. Click **Save and Close**.

This filter criterion downloads the objects with the store visit activity for the next two days.

6. Once you configure the sync rules, run **Prepare Consumer Goods Appointment Download Document** job.

After you run the job, as a salesperson, you can see the required information from your mobile application:

1. Go to the mobile application and sync the data using the **Pending Sync** option.

Based on your sync rules, your mobile application shows the filtered data.

2. Go to **Accounts > Contracts** to see the contracts in the active status.

Similarly, your mobile application shows the required data per your sync rules and filters.

## Objects in Sync Package

The following list shows the objects in the sync package.

Object Name	Description
Route	Indicates the routes based on the criteria.
Manufacturer	Indicates the manufacturers.
<b>DetailingProduct</b>	Indicates the detailing products.
Activity	Indicates the activities which aren't completed, store visit is Y, and RouteID is the route being processed.
<b>ProductDetailing</b>	Indicates the product detailing records related to the activity.
Accounts	Indicates the accounts related to the activity and the route.
__ORACO__CGContractPrintTpt_c	Indicates the contract print template records related to the accounts, order, payment, invoice, contract, inventory load, inventory reload, and route settlement.
__ORACO__TemplateFile_c	Indicates the template file related to the print template.
Person	Indicates the contact person of the account.
Resource	Indicates the resource of the account.
Visit History	Indicates the completed activities related to the account.
Product Detailing	Indicates the product detailing records of the activity.
Inventory	Indicates the inventory related to the account.

Object Name	Description
<b>AccountPromotion</b>	Indicates the account promotion records related to the account.
Promotion	Indicates the promotion records based on the account promotion records including all child records.
__ORACO__ComboGroupDSD_c	Indicates the combo group records related to the promotion.
Promotion Survey Template	Indicates the promotion survey template records.
<b>Pricebook</b>	Indicates the price book related to the account.
Product assortment	Indicates the assortment related to the account.
Assortment Line	Indicates the assortment lines related to the assortment of the account.
Products	Indicates the products added to the assortment line.
UOM Conversion	Indicates the UOM conversion records for the product.
Assortment Line Relationship	Indicates the assortment line relationship records related to the account.
Priority Portfolio	Indicates the priority portfolio records related to the account.
<b>PriorityGroup</b>	Indicates the priority groups related to the portfolio.
<b>ProductGroup</b>	Indicates the product groups related to the priority portfolio.
<b>ProductGroupProduct</b>	Indicates the products added to the priority group.
__ORACO__MerchLocation_c	Indicates the merchandising locations related to the account.
__ORACO__AssignedAssets_c	Indicates the assets assigned to the merchandising location.
__ORACO__AccountObjective_c	Indicates the objective IDs related to the account.
<b>businessPlans</b>	Indicates the business plans related to the account objective.
__ORACO__KPIRelationship_c	Indicates the KPI relationships related to the business plan.
<b>ObjectiveTask</b>	Indicates the objective tasks related to the business plans.
__ORACO__AccountCluster_c	Indicates the cluster IDs the account is a part of.

Object Name	Description
__ORACO__Cluster_c	Indicates the cluster details of the account.
__ORACO__CTemplateCluster_c	Indicates the template cluster details.
__ORACO__ForecastAttainment_c	Indicates the forecast attainment for the account.
__ORACO__BankAccount_c	Indicates the bank account details of the account.
Account Survey template	Indicates the survey template details of the account.
<b>AccountDistributor</b>	Indicates the account distributor information for the account.
Account Shopping cart template header	Indicates the shopping cart template header ID related to the account.
shopping cart template header	Indicates the shopping cart template header details.
__ORACO__ShoppingCartTpl_c	Indicates the shopping cart details including child records.
__ORACO__AccountTaskDetails_c	Indicates the account task details related to store visit tasks associated to an activity.
__ORACO__SurveyTemplate_c	Indicates the survey template records related to the tasks of the activity.
__ORACO__AccountContract_c	Indicates the account contracts for the accounts of the activity.
__ORACO__CGContract_c	Indicates the contract details of the account.
<b>ContractTask</b>	Indicates the tasks related to the contract.
__ORACO__PrintDocument_c	Indicates the print documents related to the contract.
__ORACO__Term_c	Indicates the terms related to the contract.
__ORACO__Benefit_c	Indicates the benefits related to the contracts and contract templates.
__ORACO__ProductBenefit_c	Indicates the product benefits.
products	Indicates the products details of the product benefits.
__ORACO__ComplianceHistory_c	Indicates the compliance history related to the benefit.
__ORACO__Condition_c	Indicates the conditions related to the benefit.

Object Name	Description
__ORACO__ConditionComplHist_c	Indicates the condition compliance history records.
__ORACO__AttainmentTarget_c	Indicates the attainment target for both benefit and condition.
__ORACO__ConditionProduct_c	Indicates the products of the condition.
__ORACO__ConditionGuard_c	Indicates the condition guards.
__ORACO__Resolution_c	Indicates the resolutions related to the benefit.
__ORACO__ManualAccrualSched_c	Indicates the manual accrual schedule for the benefit.
__ORACO__BenefitGuard_c	Indicates the benefit guard.
Currencies	Indicates the currencies available.
<b>ConditionTemplate</b>	Indicates the condition templates available.
Contract templates	Indicates the contract templates available.
products	Indicates the products details.
__ORACO__ConditionGuard_c	Indicates the guards related to the condition.
__ORACO__ConditionProduct_c	Indicates the products of the condition.
__ORACO__Term_c	Indicates the terms related to the contract template.
<b>DistributeCentre</b>	Indicates the distribution center of the route.
Route allocations	Indicates the route allocations in the distribution center.
Route resource	Indicates the route resource details.
Resource	Indicates the resources related to the route.
<b>Route pricebook</b>	Indicates the price book details of the route.
Route assortments	Indicates the assortments related to the route.
Payments	Indicates the payments related to the account.



Object Name	Description
Payment Lines	Indicates the payment lines.
Order	Indicates the orders related to the account.
Order Lines	Indicates the order lines of the order.
Shipment	Indicates the shipments and their status.
Shipment lines	Indicates the shipment lines.
Invoices	Indicates the invoices of the shipment.
Invoice lines	Indicates the invoice lines available.
Credit line	Indicates the credit lines related to the account.
Credit note	Indicates the credit notes related to the account.

Most objects included in sync follow direct data relationships to either route, account, or appointment. Your sync package includes contract templates and condition templates, though these two objects have no direct relationship to route, account, or appointment. To improve the data relevance, the contract templates and condition templates in your mobile sync package are automatically filtered based on the route segment value.



# 9 Application Setup

## Hide Icons for Partners

As an administrator, you can manage funds, fund allocation, and claims. You can enable or disable the partners from accessing fund allocations and claims by hiding the MDF icons on the springboard.

To hide the MDF icon on the springboard for partners:

1. Ensure that you're in an active sandbox.
2. Select Structure from Tools.
3. Select MDF on the Navigation Configuration page.
4. Complete the following steps on the Edit Page Entry page:
  - a. Select EL Expression from the Navigator drop-down list.
  - b. Click Edit to provide the EL Expression.
  - c. On the Expression Editor, provide the following:

```
#!!(securityContext.userInRole['<Enter role code of partner administrator custom here>,<Enter role code of partner sales manager custom here>'])}
```

**Note:** You must provide the role code for the partner administrator custom role and the partner sales manager custom role in the expression.

- d. Click **Validate OK**.
- e. Select EL Expression from the Springboard drop-down list.
- f. Click Edit to provide the EL Expression.
- g. On the Expression Editor, provide the following:

```
#!!(securityContext.userInRole['<Enter role code of partner administrator custom here>,<Enter role code of partner sales manager custom here>'])}
```

**Note:** You must provide the role code for the partner administrator custom role and the partner sales manager custom role in the expression.

- h. Click **Validate** and **OK**.
5. Click **Save and Close**.
6. Publish the sandbox.

The MDF icon has been hidden for partner users.

## Replace Terms

As an administrator, you can replace your sales application with terms specific to consumer goods.

**Note:** Additionally, the Business Plan object was renamed with the ready to use name, Objective.

## Replace Terms

Replace in User Interface Text, Multipart Validation Messages, and Global Menu Label Text:

Term Type	Search For	Replace With
Singular	MDF Budget	Fund
Plural	MDF Budgets	Funds
Singular	MDF budget	fund
Plural	MDF budgets	funds
Singular	MDF Request	Fund Allocation
Plural	MDF Requests	Fund Allocations
Singular	MDF request	fund allocation
Plural	MDF requests	fund allocations

## Replace Terms in User Interface Text

Replace the following terms in the user interface text:

Term Type	Search For	Replace With	Search	Replace	Term Description
Singular	Budgets	Funds	Budgets	Funds	Indicates the label that displays when the user hovers over the MDF Budgets tab.
Singular	Create Budget	Create Fund	Create Budget	Create Fund	Indicates the label for the button on the MDF Budgets list to enable the creation of an MDF budget.
Singular	Delete Budget	Delete Fund	Delete Budget	Delete Fund	Indicates the label for the action that allows a user to delete a budget.

Term Type	Search For	Replace With	Search	Replace	Term Description
Singular	Requests	Fund Allocations	Requests	Fund Allocations	Indicates the label that displays when the user hovers over the MDF Requests tab.
Singular	Create Request	Create Allocation	Create Request	Create Allocation	Indicates the label of the button on the MDF Request list that allows the creation of an MDF Request.

## Replace Terms in Global Menu Label Text

Replace the following terms in the global menu label text:

Term Type	Search For	Replace With	Search	Replace	Term Description
Singular	Budgets	Funds	Budgets	Funds	Navigator menu and springboard item that opens the Budgets work area, where users can manage MDF budget, request, and claim information. This work area is part of the Oracle Fusion Partner Relationship Management product.

## How to Replace Terms

To replace Oracle CX Sales terms with Consumer Goods terms:

1. Ensure that you're in an active sandbox.
2. Navigate to **User Interface Text** in Tools.
3. Click **Search and Replace** on the User Interface Text page.

4. On the Search and Replace Text dialog box, provide the following information:
  - a. Select the language in which you want to replace the term.
  - b. For changes applicable to User Interface Text, Multipart Validation Messages, and Global Menu Label Text, complete the following steps:
    - i. For the **Search For and Replace With** fields, provide the information as mentioned in the **Replacing Terms in User Interface Text, Multipart Validation Messages, and Global Menu Label Text**.
    - ii. For the Match Case and the Match Complete Word or Phrase fields, select the Match Case field.
    - iii. In the Included in Search area, select
      - o User Interface Text
      - o Multipart Validation Messages
      - o Global Menu Label Text
  - c. For changes only applicable to User Interface Text, complete the following steps:
    - i. For the Search For and Replace With fields, provide the information mentioned in the **Replacing Terms Only in User Interface Text** section.
    - ii. For the Match Case and the Match Complete Word or Phrase fields, select both options.
    - iii. In the Included in Search area, select User Interface Text.
  - d. For changes only applicable to Global Menu Label Text, complete the following steps:
    - i. For the Search For and Replace With fields, provide the information mentioned in the **Replacing Terms in Global Menu Label Text** section.
    - ii. For the Match Case and the Match Complete Word or Phrase fields, select both options.
    - iii. In the Included in Search area, select Global Menu Label Text.
  - e. Click **Preview Changes**.
5. On the User Interface Text page, complete the following steps:
  - a. For changes applicable to User Interface Text, Multipart Validation Messages, and Global Menu Label Text, complete the following steps:
    - i. Navigate to the following tabs and review the instances of the terms to replace:
      - o User Interface Text
      - o Global Menu Label Text
      - o Messages
    - ii. Don't deselect the Exclude check box for any of the instances of the terms being replaced.
  - b. For changes applicable to User Interface Text or to Global Menu Label Text, complete the following steps:
    - Note:** Use the descriptions provided for each term to locate terms which are replaced and excluded.
      - i. Use the Search and Replace fields to locate and review the instances of the terms to replace.
      - ii. Select the Exclude check box for all the instances of the term which must not be replaced.
6. Click **Save and Close**.
7. Publish the sandbox.

The required Oracle CX Sales terms have been replaced with Consumer Goods terms.

# Register Web Services

As an administrator, you can use web services to get a record or initiate an action.

You must register Web services to:

- Retrieve item or product details from another application
- Initiate ESS jobs to generate funds

To register Web services:

1. Ensure that you're in an active sandbox.
2. Navigate to the Application Composer.
3. Select **Web Services** from the Common Setup list.
4. Click **Create Web Service Reference**.
5. On the Select Connection Type dialog box and select SOAP.
6. On the Create Soap Web Service Connection page, provide the following information:
  - To retrieve item or product details from another application, provide the following information:
 

**Note:** Before you register the web service to fetch item or product details, locate your WSDL URL. The WSDL URL is typically located at `http://scmhost:port/egpltems/ItemServiceV2?wsdl` format.

Fields	Values
Name	ItemWebService1
WSDL URL	Enter the URL and click Read WSDL.
Security Scheme	Initiate with separate user credentials and message protection
Credential Key	Select the administrator role.
Disable Time Stamp	Select the check box.

- To initiate ESS jobs to generate funds:
 

**Note:** Before you register the web service to initiate scheduler jobs to generate funds; locate your WSDL URL. The WSDL URL is typically located at `http://scmhost:port/ess/esswebservice?WSDL`.

Fields	Values
Name	ESSWebService

Fields	Values
WSDL URL	<p>Enter the WSDL URL and click Read WSDL. The warning message appears indicating that the preferred security options couldn't be determined. Contact web service provider or consult web service documentation to obtain correct security details. If error occurs during service invocation, contact system administrator with the web service and error details.</p> <p>The service is autopopulated to <code>{http://xmlns.oracle.com/scheduler}ESSWebServiceCallback</code>. You must change it to <code>{http://xmlns.oracle.com/scheduler}ESSWebService</code></p>
Security Scheme	Call with separate user credentials and message protection
Credential Key	Select the administrator role.
Disable Time Stamp	Select the check box.

7. Click **Save and Close**.

8. Publish the sandbox.

The web services have been registered.

## Register Content and Experience Cloud

Oracle Content and Experience is a cloud-based content hub to drive omnichannel content management and accelerate experience delivery. You can use this powerful collaboration and workflow management tool to streamline the creation and delivery of content and improve customer engagement. In this product, you can use the content and experience cloud for uploading the photos and planograms for assortment plans and merchandising plans.

**Note:** To use content and experience cloud for managing attachments, you can configure this web service. For more information, see Content and Experience Cloud administration guide.

### Content and Experience Cloud Prerequisites:

- Ensure you read the prerequisites for registering web services in Content and Experience Cloud.
- Ensure you have as an administrator.
- Ensure you have permissions to the cloud URL. For example, <https://example.oraclecloud.com>.
- Ensure you have permissions to create, delete, and search the folder.

As an administrator, perform the following steps:

### Create a Folder

See the example

1. Ensure that you're in an active sandbox.



2. Navigate to the Application Composer.
3. Select **Web Services** from the Common Setup list.
4. Click **Create Web Service Reference**.
5. In Web Services, click **New**.
6. Select Connection Type: REST
7. Name: **ContentCloudCreateFolder**
8. URL: <<doc\_cloud\_hostname>>/documents/api/1.2/folders/##folderId##. For example, https://demo-gse00009991.documents.us2.oraclecloud.com/documents/api/1.2/folders/##folderId##
9. Authentication Scheme: "Call with basic authentication"
10. In the Credentials Key, click create and provide the Critical Success Factor (CSF) Key, user name, and password of cloud administrator.
11. Method Name: **POST** and Format: **JSON**
12. Request Payload (Code Sample)
13. Response Payload

```
{ "name": "FUSE300100115027107", "description": "rest folder" }
```

```
{ "childItemsCount": "0", "createdBy": { "displayName": "cecsadmina", "id": "U4D1C916DAC71D5D7A60EE35C2DB3E7D25FC", "loginName": "twebcli.cecsadmina", "type": "user" }, "createdTime": "2017-11-28T04:34:56Z", "errorCode": "0", "id": "F8BF28DEDB91462D7B3370A1C2DB3E7D25FCE4F631DA", "modifiedBy": { "displayName": "cecsadmina", "id": "U4D1C916DAC71D5D7A60EE35C2DB3E7D25FC", "loginName": "twebcli.cecsadmina", "type": "user" }, "modifiedTime": "2017-11-28T04:34:56Z", "name": "FUSE300100115027107", "ownedBy": { "displayName": "cecsadmina", "id": "U4D1C916DAC71D5D7A60EE35C2DB3E7D25FC", "loginName": "twebcli.cecsadmina", "type": "user" }, "parentID": "self", "type": "folder" }
```

14. Click **Save and Close**.

### Delete a Folder

See the example

1. Ensure that you're in an active sandbox.
2. Navigate to the Application Composer.
3. Select **Web Services** from the Common Setup list.
4. Click **Create Web Service Reference**.
5. In Web Services, click **New**.
6. Select Connection Type: REST
7. Name: **ContentCloudDeleteFolder**
8. URL: <<doc\_cloud\_hostname>>/documents/api/1.2/folders/##folderId##. For example, https://demo-gse00009991.documents.us2.oraclecloud.com/documents/api/1.2/folders/##folderId##
9. Authentication Scheme: "Call with basic authentication"
10. In Credentials Key, select the CSF Key that you have created.
11. Method Name: **DELETE** and Format: **JSON**
12. Request Payload: Schema URL
13. Response Payload: Schema URL
14. Click **Save and Close**.

### Search for a Folder

See the example

1. Ensure that you're in an active sandbox.
2. Navigate to the Application Composer.
3. Select **Web Services** from the Common Setup list.
4. Click **Create Web Service Reference**.

5. In Web Services, click **New**.
6. Select Connection Type: REST
7. Name: **ContentCloudSearchFolder**
8. URL: <<doc\_ccloud\_hostname>>/documents/api/1.2/folders/##ParentId##/items?filterName=##FolderName##orderBy=name:asc/. For example, https://demo-gse00009991.documents.us2.oraclecloud.com/documents/api/1.2/folders/##folderId##
9. Authentication Scheme: "Call with basic authentication"
10. In Credentials Key, select the CSF Key that you have created.
11. Method Name: **GET** and Format: **JSON**
12. Request Payload: Schema URL
13. Response Payload: Schema URL

```
{ "count": "2", "totalResults": "2", "hasMore": "0", "errorCode": "0",
  "id": "FF4729683CD68C1AFB1AE87DT000000000100000001", "parentID": "self", "name": "foldera",
  "description": "rest folder", "type": "folder", "size": "39", "childItemsCount": "2",
  "createdTime": "2014-02-21T20:52:37Z", "modifiedTime": "2014-02-21T20:52:37Z", "createdBy":
  { "displayName": "User AA", "id": "U0EAA20910FAF3052ACB79E4T0000000001", "loginName": "userAALoginName",
  "type": "user" }, "ownedBy": { "displayName": "User AA", "id": "U0EAA20910FAF3052ACB79E4T0000000001",
  "loginName": "userAALoginName", "type": "user" }, "modifiedBy": { "displayName": "User
  AA", "id": "U0EAA20910FAF3052ACB79E4T0000000001", "loginName": "userAALoginName",
  "type": "user" }, "items": [ { "id": "FB4CD874EF94CD2CC1B60B72T000000000100000001",
  "parentID": "FF4729683CD68C1AFB1AE87DT000000000100000001", "name": "restFolder",
  "type": "folder", "size": "39", "childItemsCount": "1", "createdTime": "2014-02-21T20:54:50Z",
  "modifiedTime": "2014-02-21T20:54:50Z", "createdBy": { "displayName": "User AA",
  "id": "U0EAA20910FAF3052ACB79E4T0000000001", "loginName": "userAALoginName", "type": "user" },
  "ownedBy": { "displayName": "User AA", "id": "U0EAA20910FAF3052ACB79E4T0000000001",
  "loginName": "userAALoginName", "type": "user" }, "modifiedBy": { "displayName": "User
  AA", "id": "U0EAA20910FAF3052ACB79E4T0000000001", "loginName": "userAALoginName",
  "type": "user" } }, { "id": "DB1C5AF480FFE61C588027A8T000000000100000001",
  "parentID": "FF4729683CD68C1AFB1AE87DT000000000100000001", "name": "example.txt",
  "type": "file", "size": "13", "version": "1", "createdTime": "2014-02-21T21:32:37Z",
  "modifiedTime": "2014-02-21T21:32:37Z", "createdBy": { "displayName": "User AA",
  "id": "U0EAA20910FAF3052ACB79E4T0000000001", "loginName": "userAALoginName", "type": "user" }, "ownedBy":
  { "displayName": "User AA", "id": "U0EAA20910FAF3052ACB79E4T0000000001", "loginName": "userAALoginName",
  "type": "user" }, "modifiedBy": { "displayName": "User AA", "id": "U0EAA20910FAF3052ACB79E4T0000000001",
  "loginName": "userAALoginName", "type": "user" } } ] }
```

14. Click **Save and Close**.

## Enable Display on Content and Experience Cloud

To display content from Oracle Content and Experience Cloud within other Sales Cloud domains, enable embedded content and add domains.

1. Access the Cloud URL, open your user menu, and click **Administration**.
2. On the Administration menu, click Security to go to Embedded Content, and select **Enabled**.
3. In the Allowed Domains box, enter a list of permitted domains, separated by commas. Ensure that the domains are in an appropriate format, for example, www.example.com
4. To restrict the domain to a particular port, include the port in the specification. For example, www.example.com:12345.
5. To allow a domain that has multiple sub-domains, you can use the \* wildcard character. For example, www.example.\* includes the domains www.example.com, www.example.co.in, and so on.

## Create Saved Searches

As an administrator, you can create a saved search with your preferences. Your sales managers can view the information for accounts owned by the salesperson reporting to them.

**Note:** Ensure you make the page composer available to the sales manager role before creating the saved search. You must use the sandbox and publish to mainline.

To make the page composer available to sales manager:

1. Click your user name in the global header and select **Edit Pages** from the list.
2. In the dialog, select **Job Role**.
3. From the list, select **Sales Manager Role**.

If you don't see the sales manager role in the list, you must provide the sales manager privilege to the administrator user.

4. Click **OK**.

You have now made the page composer available to the sales manager role.

To create a saved search:

1. Go to **Accounts**.
2. On the Accounts page, select **Create or Edit Lists** from the **List** field.  
The Saved Searches dialog appears.
3. In **Record Set**, select **Equals** and then select **Records where I am on the team**.
4. Enter a suitable **Name**.
5. Click **Save**.
6. Select the **Set as Default** check box to make this search the one that loads when you first access the page.
7. Click **OK**.
8. Click **Close**.

## Configure Saved Searches for Funds and Budgets

As an administrator, you can create saved searches specific to budgets and funds for specific roles. You can remove a set of predefined saved searches which aren't specific to the consumer goods industry.

Create the following saved searches for all users:

- My Funds
- All Active Funds
- All Draft Funds

Create the following saved searches for the marketing manager custom role:

- My Fixed Budgets

- My Accrual Budgets
- All Active Budgets
- All Draft Budgets

Remove the following saved searches for all the roles:

- All Budgets
- My Active Budgets
- My Budgets
- My Budgets Pending Approval

## Create Saved Searches

To create saved searches:

1. Sign in using administrator role.  
**Note:** Ensure the administrator has access to the marketing manager custom role.
2. Ensure that you're in an active sandbox.
3. Select **Edit Pages** from the **Settings and Actions** menu.  
 You can open the Settings and Actions menu by clicking your user image or name in the global header.
4. On the Edit Pages window, select the layer depending on the saved search you're creating:

Saved Searches	Select
<ul style="list-style-type: none"> <li>○ My Funds</li> <li>○ All Active Funds</li> <li>○ All Draft Funds</li> </ul>	Select <b>Edit</b> for the Site layer and click <b>OK</b> .
<ul style="list-style-type: none"> <li>○ My Fixed Budgets</li> <li>○ My Accrual Budgets</li> <li>○ All Active Budgets</li> <li>○ All Draft Budgets</li> </ul>	<ol style="list-style-type: none"> <li>a. Select <b>Edit</b> for the Job Role layer and select <b>Marketing Manager Custom</b> from the Value drop-down list.</li> <li>b. Click <b>OK</b>.</li> </ol>

5. Navigate to **Funds** subtab of MDF in Sales.
6. Click **Show Advanced Search**.
7. On the Advanced Search panel, perform the following steps:
  - a. Select the following for each of the saved searches you're creating the Saved Search drop-down list.

Saved Searches	Select
My Funds	My Budgets
All Active Funds	My Funds

Saved Searches	Select
All Draft Funds	All Active Funds
My Fixed Budgets	My Funds
My Accrual Budgets	My Fixed Budgets
All Active Budgets	My Fixed Budgets
All Draft Budgets	All Active Budgets

b. Complete the following steps for each saved search that you're creating:

Saved Searches	Values
My Funds	<ul style="list-style-type: none"> <li>i. Click <b>Add</b> and select Type.</li> <li>ii. Provide the following information for the Type fields: <ul style="list-style-type: none"> <li>a. Select <b>Ends with</b>.</li> <li>b. Provide FUND as the value.</li> </ul> </li> </ul>
All Active Funds	<ul style="list-style-type: none"> <li>i. Provide the following information for the Record Set fields: <ul style="list-style-type: none"> <li>a. Select <b>Equals</b>.</li> <li>b. Provide <b>I can see</b> as the value.</li> </ul> </li> <li>ii. Provide the following information for the Status fields: <ul style="list-style-type: none"> <li>a. Select <b>Equals</b>.</li> <li>b. Select the Active check box.</li> </ul> </li> </ul>
All Draft Funds	<p>Provide the following information for the Status fields:</p> <ul style="list-style-type: none"> <li>i. Select <b>Equals</b>.</li> <li>ii. Select the Draft check box.</li> </ul>
My Fixed Budgets	<p>Provide the following information for the Type fields:</p> <ul style="list-style-type: none"> <li>i. Select <b>Equals</b>.</li> <li>ii. Select Fixed budget from the drop-down list.</li> </ul>
My Accrual Budgets	<p>Provide the following information for the Type fields:</p> <ul style="list-style-type: none"> <li>i. Select <b>Equals</b>.</li> <li>ii. Select Accrual budget from the drop-down list.</li> </ul>
All Active Budgets	<ul style="list-style-type: none"> <li>i. Provide the following information for the Record Set fields: <ul style="list-style-type: none"> <li>a. Select <b>Equals</b>.</li> <li>b. Provide <b>I can see</b> as the value.</li> </ul> </li> </ul>

Saved Searches	Values
	<ul style="list-style-type: none"> <li>ii. Provide the following information for the Status fields:                             <ul style="list-style-type: none"> <li>a. Select <b>Equals</b>.</li> <li>b. Select the Active check box.</li> </ul> </li> <li>iii. Provide the following information for the Type fields:                             <ul style="list-style-type: none"> <li>a. Select <b>Ends with</b>.</li> <li>b. Provide BUDGET as the value.</li> </ul> </li> </ul>
All Draft Budgets	Provide the following information for the Status fields: <ul style="list-style-type: none"> <li>i. Select <b>Equals</b>.</li> <li>ii. Select the Draft check box.</li> </ul>

- c. Click **Search** to verify your parameters.
  - d. Click **Save**.
  - e. On the Create Saved Search window, provide the following information:
    - i. Name each of the saved search as mentioned.
    - ii. Deselect the Set as Default check box for all the saved searches except for My Funds.
    - iii. Click **OK**.
  - f. Close the Advance Search panel.
8. Publish the sandbox.

The saved searches are created to view budgets and funds.

## Remove Saved Searches

To remove saved searches:

1. Sign in using administrator role.

**Note:** Ensure that you have access to the Marketing Manager custom role.

2. Ensure that you're in an active sandbox.
3. Select **Edit Pages** from the **Settings and Actions** menu.

You can open the Settings and Actions menu by clicking your user image or name in the global header.

4. Select **Edit** for the Site layer and click **OK**.
5. Navigate to Funds subtab of MDF in Sales.
6. Click **Show Advanced Search**.
7. On the Advanced Search panel, select **Personalize** from the Saved Search drop-down list.
8. On the Personalize Saved Search window, perform the following steps:
  - a. Select each saved search that you must remove one at a time from the Saved Search drop-down list.
  - b. Deselect the Show in Search List check box.
  - c. Click **Apply > OK**.
9. Close the Advance Search panel.
10. Publish the sandbox.

The saved searches are removed.

## Calculate Fund Amount using Accrual Rules

As administrators, use accrual rules to calculate fund amount for accrual budgets and accrual funds. Use SOAP web services to import fund amount. Fund amount for accrual budgets and accrual funds is based on value of orders and shipments.

Calculate the fund amount for each accrual budget and accrual fund outside Oracle CX Sales using your organization specific integration. You can calculate the fund amount using accrual rules which are based on the value the product associated with the accrual budget or the accrual fund. The product value for calculation fund amount is dependent on the value of the total orders and shipments.

Calculate and update the fund amount in accrual budget and accrual fund records. Use the following algorithm to import the fund amount using the SOAP web services:

```
For each Fund F of an Accrual Budget
  Set fundAmount = 0;
  For each Accrual Rule R of the Accrual Budget,
  For each Product P of rule R,
  Set count = 0;
  Set amount = 0;

  Get Order Line Rollups of the Account of the fund F,
  where Order Line product = rule product P
  and creation date of Order is with in the Start Date and End Date of the rule R

  For each order line rollups fetched
  count = count + order line quantity
  amount = amount + order line price * order line quantity

  If Basis on rule R is Cases
  fundAmount = fundAmount + count * RateNumber in rule R
  else
  fundAmount = fundAmount + amount * RatePercent in rule R

Update Fund F,
set Fund Initial Amount = fundAmount
```





# 10 Workflows and Triggers

## Create Object Workflow Setup for Order

As an administrator, you create this object workflow for an order which is in the Overdue status. You can manage the orders better by creating workflows to track the date of submission and the duration for pending payment.

For more information about object workflow and the types of workflows, see Oracle Sales application Extending Sales guide.

To create the object workflow:

1. Navigate to Application Composer.
2. Select **Common** from the **Application** list.
3. Click **Object Workflow** on the Overview page.
4. Select **Actions > Create**.
5. Create Object Workflow page opens.
6. Select **Order** from the **Object** list.
7. Enter **Name** as **Order update flow**.
8. In the Event Point and Condition area,
  - a. Select **When a record is updated**.
  - b. Click the expression builder icon and enter the following condition in the Expression Builder dialog:

```
if(isAttributeChanged("__ORACO_OrderStatus_c") && __ORACO_OrderStatus_c ==  
  'ORA_ACO_ORDER_STATUS_SUBMITTED' && __ORACO_PaymentStatus_c == "ORA_ACO_PAYMENT_STATUS_PENDING")  
  
  {  
  return true;  
  }  
  else  
  {  
  return false;  
  }  
}
```

- c. Click **OK**.
9. In the Actions area, click the Create button.  
Create Action: Field Updates page opens.
  10. Enter **Name** as **Update order status to Overdue**.
  11. In the Execution Schedule area, specify the number of days after which the workflow must be triggered.
  12. On Field Update Details area:
    - a. In **Field to Update**, select **Order Status**.
    - b. In **Value**, select **Overdue**.
  13. Click **Save and Close**.

# Associate Products and Containers in an Assortment Line Relationship

As an administrator, you can associate product and container with each other in assortment line relationship. They must belong to same assortment. Create triggers to ensure that product and container from different assortments can't be associated with each other.

To create triggers to ensure that products and containers from different assortments aren't associated with each other in an assortment line relationship:

1. Ensure that you're in an active sandbox.
2. Go to the **Application Composer**.
3. Select **Common** from the Application list.
4. Expand **Custom Object > Assortment Line Relationship**
5. Click **Server Scripts**.
6. Navigate to the Triggers tab and click **Action > Add** to create the new trigger.
7. On the Create Object Trigger page, specify the following two triggers:

- o **Trigger:** Before Insert in Database

**Trigger Name:** ValidateAssortmentLineRelationship\_BeforeInsert

In **Trigger Definition**, paste the following script from this document and click **Save and Close**:

```
def fromAssort = __ORACO__FromAssortmentLine_Obj_c?.__ORACO__ProductAssortment_Id_c
def toAssort = __ORACO__ToAssortmentLine_Obj_c?.__ORACO__ProductAssortment_Id_c
if(fromAssort != toAssort)
{
throw new oracle.jbo.ValidationException("Product and container should belong to the same
assortment")
}
```

- o **Trigger:** Before Update in Database

**Trigger Name:** ValidateAssortmentLineRelationship\_BeforeUpdate

In **Trigger Definition**, paste the following script from this document and click **Save and Close**:

```
if(isAttributeChanged('__ORACO__FromAssortmentLine_Id_c') ||
isAttributeChanged('__ORACO__ToAssortmentLine_Id_c')) {

def fromAssort = __ORACO__FromAssortmentLine_Obj_c?.__ORACO__ProductAssortment_Id_c
def toAssort = __ORACO__ToAssortmentLine_Obj_c?.__ORACO__ProductAssortment_Id_c
if(fromAssort != toAssort)
{
throw new oracle.jbo.ValidationException("Product and container should belong to the same
assortment")
}

}
```

8. Publish the sandbox.

Triggers ensure that a product and a container from different assortments aren't associated with each other in an assortment line relationship.

## Enable Account Managers to View Funds

As an administrator, you can provide the account managers the ability to view funds that are associated with accounts. Here's how you can create triggers to enable account managers to view account funds:

1. Select the sandbox you want to configure.
2. Select **Navigator > Application Composer**.
3. Select **Sales** from the Application list.
4. Expand **Standard Objects > MDF Budget**.
5. Click **Server Scripts**.
6. Go to the Triggers tab and then click **Action > Add** to create the new triggers.
7. On the Create Object Trigger page, specify these triggers:

- o Trigger: Before Insert in Database

Trigger Name: InsertIntoBudgetTeam\_BeforeInsert

In Trigger Definition, paste the following script from this document and click **Save and Close**:

```
__ORACO__insertPartnerTeamintoFundTeam_Create();  
__ORACO__insertAccountTeamintoFundTeam_Create();  
__ORACO__insertPartnerTeamintoBudgetTeam_Create();  
__ORACO__insertAccountTeamintoBudgetTeam_Create();
```

- o Trigger: Before Update in Database

Trigger Name: InsertIntoBudgetTeam\_BeforeUpdate

In Trigger Definition, paste the following script from this document and click **Save and Close**:

```
__ORACO__insertPartnerTeamintoFundTeam_Update();  
__ORACO__insertAccountTeamintoFundTeam_Update();  
__ORACO__insertPartnerTeamintoBudgetTeam_Update();  
__ORACO__insertAccountTeamintoBudgetTeam_Update();
```

8. Publish the sandbox.

## Set Mandatory Budget Type or Fund Type

As an administrator, you can manage budgets and funds in two ways, Fixed Budget and Accrual Budget. Create triggers to select budget type or fund type as mandatory while creating or updating a budget or a fund.

To create the trigger to select of the budget or fund type mandatory:

1. Ensure that you're in an active sandbox.
2. Navigate to the **Application Composer**.
3. Select **Sales** from the Application list.
4. Expand **Standard Objects > MDF Budgets**.
5. Click **Server Scripts**.
6. Navigate to the Triggers tab and click **Action > Add** to create a trigger.
7. On the Create Object Trigger page, specify the following two triggers:

- o Trigger: Before Insert in Database

Trigger Name: MandatoryFundBudgetType\_BeforeInsert

In Trigger Definition, paste the following script from this document and click **Save and Close**:

```
if(__ORACO__BudgetFundType_c == null)
{
throw new oracle.jbo.ValidationException(adf.util.__ORACO__getMessage('ACO_BUDGET_FUND_TYPE'))
}
```

- o Trigger: Before Update in Database

Trigger Name: MandatoryFundBudgetType\_BeforeUpdate

In Trigger Definition, paste the following script from this document and click **Save and Close**:

```
if(isAttributeChanged('__ORACO__BudgetFundType_c') && __ORACO__BudgetFundType_c == null)
{
throw new oracle.jbo.ValidationException(adf.util.__ORACO__getMessage('ACO_BUDGET_FUND_TYPE'))
}
```

8. Publish the sandbox to create the required trigger.

## SetFund Allocation Status

As an administrator, you can set the status of fund allocations to pending approval after the status of the associated promotion is changed to approved. Create a trigger to set the status of fund allocations to pending approval.

**Note:** After creating the trigger, create an object workflow to set the status of fund allocations to approved after the fund status changes to pending approval.

1. Ensure that you're in an active sandbox.
2. Navigate to the **Application Composer**.
3. Select **Sales** from the Application list.
4. Expand **Custom Objects > Promotion**.
5. Click **Server Scripts**.
6. Navigate to the Triggers tab and click **Action > Add** to create the new trigger.
7. On the Create Object Trigger page, specify the following information for the trigger:

- Trigger: Before Update in Database.
- Trigger Name: FundAllocationStatus\_BeforeUpdate
- In Trigger Definition, paste the following script from this document and click **Save and Close**.

```
__ORACO__setFundAllocationStatus();
```

**8.** Publish the sandbox.

The trigger is created to set the status of fund allocations to **Approved** after the status of the associated promotion is set to approved.

## Restrict Field Update Access

As an administrator or implementor, you restrict the access to update fields so that only specific users can edit the fields.

Here's how you can restrict access:

1. Select the sandbox you want to configure.
2. Select **Navigator > Application Composer** and expand the corresponding object.
3. Click **Server Scripts**.
4. Replace the Role Name in the script with the roles created.
5. Click **New** in Field Validation.
6. Add the values as per your requirement.

Here are the sample roles used in the script:

- Sales Manager: ZBS\_SALES\_MANAGER\_JOB\_CUSTOM
- Account Manager: CRM\_ACCOUNT\_MANAGER\_CUSTOM
- Sales Administrator: ZBS\_SALES\_ADMINISTRATOR\_JOB\_CUSTOM

Here are the values for the Account object:

**Note:** You must enter the error message for the Field Validation Rule as: `The current user doesn't have the privilege to update this field`

Rule and Field Name	Rule Definition
Minimum Order Quantity	<pre>if (adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_ADMINISTRATOR_JOB_CUSTOM')    adf.context.getSecurityContext()?.isUserInRole('CRM_ACCOUNT_MANAGER_CUSTOM')    adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_MANAGER_JOB_CUSTOM')) {     return true; } else{     adf.error.raise(null);     def origPri = getOriginalAttributeValue("__ORACO__MinimumOrderQuantity_c");     setAttribute('__ORACO__MinimumOrderQuantity_c',origPri)     return false; }</pre>

Rule and Field Name	Rule Definition
	}
Minimum Order Amount	<pre> if (adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_ADMINISTRATOR_JOB_CUSTOM')    adf.context.getSecurityContext()?.isUserInRole('CRM_ACCOUNT_MANAGER_CUSTOM')    adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_MANAGER_JOB_CUSTOM')) {     return true; } else{     adf.error.raise(null);     def origPri = getOriginalAttributeValue("__ORACO_MinimumOrderAmount_c")     setAttribute('__ORACO_MinimumOrderAmount_c',origPri)     return false; } </pre>
Account Order Minimums Applied	<pre> if (adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_ADMINISTRATOR_JOB_CUSTOM')    adf.context.getSecurityContext()?.isUserInRole('CRM_ACCOUNT_MANAGER_CUSTOM')    adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_MANAGER_JOB_CUSTOM')) {     return true; } else{     adf.error.raise(null);     def origPri = getOriginalAttributeValue("__ORACO_ApplyAccountOrderMinimums_c")     setAttribute('__ORACO_ApplyAccountOrderMinimums_c',origPri)     return false; } </pre>
Proof of Purchase Payment Authorized	<pre> if (adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_ADMINISTRATOR_JOB_CUSTOM')) {     return true; } else{     adf.error.raise(null);     def origPri = getOriginalAttributeValue("__ORACO_ProofOfPurchasePaymentAuthorized_c")     setAttribute('__ORACO_ProofOfPurchasePaymentAuthorized_c',origPri)     return false; } </pre>
Coupon Payment Authorized	<pre> if (adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_ADMINISTRATOR_JOB_CUSTOM')) {     return true; } else{     adf.error.raise(null);     def origPri = getOriginalAttributeValue("__ORACO_CouponPaymentAuthorized_c")     setAttribute('__ORACO_CouponPaymentAuthorized_c',origPri)     return false; } </pre>
Customer ID	<pre> if (adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_ADMINISTRATOR_JOB_CUSTOM')) {     return true; } else{     adf.error.raise(null); } </pre>

Rule and Field Name	Rule Definition
	<pre>def origPri = getOriginalAttributeValue("__ORACO__CouponPaymentAuthorized_c") setAttribute('__ORACO__CouponPaymentAuthorized_c',origPri) return false; }</pre>
Taxpayer Name	<pre>if (adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_ADMINISTRATOR_JOB_CUSTOM')) { return true; } else{ adf.error.raise(null); def origPri = getOriginalAttributeValue("__ORACO__CouponPaymentAuthorized_c") setAttribute('__ORACO__CouponPaymentAuthorized_c',origPri) return false; }</pre>

Here are the values for the Route object:

**Note:** You must enter the error message for the Field Validation Rule as: `The current user doesn't have the privilege to update this field`

Rule Name and Field Name	Rule Definition
Minimum Order Quantity	<pre>if (adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_ADMINISTRATOR_JOB_CUSTOM')    adf.context.getSecurityContext()?.isUserInRole('CRM_ACCOUNT_MANAGER_CUSTOM')    adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_MANAGER_JOB_CUSTOM')) { return true; } else{ adf.error.raise(null); def origPri = getOriginalAttributeValue("__ORACO__MinimumOrderQuantity_c") setAttribute('__ORACO__MinimumOrderQuantity_c',origPri) return false; }</pre>
Minimum Order Amount	<pre>if (adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_ADMINISTRATOR_JOB_CUSTOM')    adf.context.getSecurityContext()?.isUserInRole('CRM_ACCOUNT_MANAGER_CUSTOM')    adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_MANAGER_JOB_CUSTOM')) { return true; } else{ adf.error.raise(null); def origPri = getOriginalAttributeValue("__ORACO__MinimumOrderAmount_c") setAttribute('__ORACO__MinimumOrderAmount_c',origPri) return false; }</pre>

Rule Name and Field Name	Rule Definition
Route Type	<pre>if (adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_ADMINISTRATOR_ JOB_CUSTOM')    adf.context.getSecurityContext()?.isUserInRole('ZBS_SALES_ MANAGER_JOB_CUSTOM')) {     return true; } else{     adf.error.raise(null);     def origPri = getOriginalAttributeValue("__ORACO__RouteType_c")     setAttribute('__ORACO__RouteType_c',origPri)     return false; }</pre>



# 11 Base Data and ESS Jobs

## Configure Sales Infolets

Use the reporting and analytics to stay up to date on the key performance indicators (KPIs) through configurable Sales Infolets.

You can view your role-specific details from the infolets. Here's how you configure the Sales Infolets page for the sales manager and salesperson:

### For Sales Manager

As sales managers, you can use these infolets to assess team performance.

Before creating the sandbox, ensure you have the permissions to configure Sales Infolets:

1. Click the user name and go to Manage Sandboxes. Create sandbox and set **Active**.
2. Go to the user name and Edit Pages.
3. Switch to Job Role layer and select value as Sales Manager job role. Click **OK**.
4. Navigate to the Sales Infolets page. Click the Infolet Repository icon and deselect the infolets you want to hide.
5. Go to the Create Infolet, add six infolets, providing the respective title for each and dimensions as 1x1. Click **Save and Close**.
6. Click each of the infolets, go to Edit Content in Actions. Add the respective tile views from go to Link Detailed Report in Actions. Add the respective detail report dashboards from **Reports and Analytics, BIPresentationServer, Shared Folder, Extension, ORACO, BI Reports**.
7. Click each of the infolets, go to Link Detailed Report in Actions and add the respective report dashboards. For example, **Reports and Analytics, BIPresentationServer, Shared Folder, Extension, ORACO, BI Reports folder**.
  - a. Title - Sales Vs Target  
Tile View - SalesVsTarget\_Tile  
Detailed Report - Sales Vs Target\_Sales Manager\_Dashboard
  - b. Title - Accounts  
Tile View - Accounts\_Tile  
Detailed Report- Accounts\_Dashboards
  - c. Title - Visits Vs Target  
Tile View - VisitsVSTarget\_Tile  
Detailed Report - Visits Vs Target\_Dashboard
  - d. Title - Eligible Promotions  
Tile View - EligiblePromotions\_Tile  
Detailed Report - Eligible Promotions\_Dashboard

- e. Title - In Flight Promotions  
Tile View - InFlightPromotions\_Tile  
Detailed Report - InFlightPromotions\_Dashboard
  - f. Title - Sales Trend  
Tile View - SalesTrend\_Tile  
Detailed Report - Sales Trend\_Dashboard
8. Close Page Composer and publish the sandbox.

## For Salesperson

As salesperson, you can view information specific to your role on the Sales Infolets page.

To configure the Sales Infolets page:

1. Sign in using the administrator role.
  - Note:** Before creating the sandbox, ensure that the role you're modifying is granted to you in Oracle Identity Manager.
2. Click the user name, and go to Manage Sandboxes. Create sandbox and set **Active**.
3. Click the user name again, and go to Edit Pages link. The user doing such modification must be assigned the role for which the modification is being done.
4. Switch to Job Role layer and select value as salesperson job role. Click **OK**.
5. Navigate to Sales Infolets page. Click the Infolet Repository icon and deselect the infolets you want to hide.
6. Click the **Create Infolet** and add six infolets, providing the respective title for each and dimensions as 1x1. Click **Save and Close**.
7. Go to infolets, Edit Content in Actions and add the respective tile views from **Reports and Analytics > BIPresentationServer > Shared Folder > Extension > ORACO > BI Reports** folder.
8. Click each of the infolets, go to Edit Detailed Report in Actions and add the respective detail report dashboards from **Reports and Analytics, BIPresentationServer, Shared Folder, Extension, ORACO, BI Reports** folder.
  - a. Title - Sales Vs Target  
Tile View - SalesVsTarget\_Tile  
Detailed Report - Sales Vs Target\_Sales Representative\_Dashboard
  - b. Title - Accounts  
Tile View - Accounts\_Tile  
Detailed Report- Accounts\_Dashboards
  - c. Title - Visits Vs Target  
Tile View - VisitsVSTarget\_Tile  
Detailed Report - Visits Vs Target\_Dashboard
  - d. Title - Eligible Promotions  
Tile View - EligiblePromotions\_Tile  
Detailed Report - Eligible Promotions\_Dashboard

- e. Title - In Flight Promotions
    - Tile View - InFlightPromotions\_Tile
    - Detailed Report - InFlightPromotions\_Dashboard
  - f. Title - Sales Trend
    - Tile View - SalesTrend\_Tile
    - Detailed Report - Sales Trend\_Dashboard
9. Close Page Composer and publish the sandbox.

**Note:** Navigate to **Manage Sandboxes** to hide the dashboard icon on your home page. Create a sandbox and set it to **Active** and click the navigator menu and select **Structure Link**. Now click the **Dashboard link** and set the value from the drop-down list to **No** and publish the sandbox.

## Import Seeded Store Visit Tasks and Type

As a sales administrator, you can set up site-level store visit tasks for each appointment type for managing store visits.

You can use the seeded store visit type and tasks in the application. To use the seeded store visit type and tasks, you must first import them and associate these tasks with the store visit type:

- STD\_ORA\_INVENTORY\_AUDIT
- STD\_ORA\_ORDER\_CAPTURE
- STD\_ORA\_PROMO\_COMP\_AUDIT
- STD\_ORA\_PROMO\_PRESENT
- STD\_ORA\_SURVEY
- STD\_ORA\_ORDER\_DELIVERY
- STD\_ORA\_ACCOUNT\_TASK
- STD\_ORA\_MANUL\_COMPL\_TASK

**Note:** You can associate standard tasks with the store visit type and custom store visit types. You can also associate custom store visit tasks with the store visit type.

Before you import the store visit tasks and type, download and save the Zip file to your local computer. The Zip file contains the following files:

- \_\_ORACO\_\_ActivityTasks\_c.csv
- \_\_ORACO\_\_ActivityType\_c.csv

To download the Zip file, see Seeded Tasks and Types for Consumer Goods (Doc ID 2133874.1).

Here's how you can import store visit tasks and type:

1. Generate import and export artifacts.
2. Import standard tasks.
3. Import store visit type.

4. Associate standard tasks with store visit type.

## Generate Import Export Artifacts

Here's how you can generate import export artifacts:

1. Click **Navigator > Application Composer > Sales Domain**.
2. Click **Import and Export**
3. In the Import and Export page, click **Generate**.

If the artifact generation fails, check the following roles and try again:

- Sign in to Security Console and verify if the sales administrator has the following two roles:

**Note:** Add the roles if not already present.

- ORA\_ZCA\_CUSTOMER\_RELATIONSHIP\_MANAGEMENT\_APPLICATION\_ADMINISTRATOR\_JOB.
- ORA\_ZCH\_MASTER\_DATA\_MANAGEMENT\_APPLICATION\_ADMINISTRATOR\_JOB.

## Import Standard Tasks

Here's how you can import the standard tasks from the given CSV file:

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Data Import and Export
  - Task: Manage File Import Activities
2. On the new page, click the new button and specify the mandatory values, and then click **Next**.

Field Name	Field Value
File Type	Text File
Upload From	Desktop
File Name	<u>ORACO_ActivityTasks_c.csv</u>
Data Type	Comma Separated
Header Row Included	Yes
Predefined	Yes
Object	Sales Custom Object

Field Name	Field Value

3. Map these fields as specified in the table.

Column Header	Example Value	Ignore	Object	Attribute
TaskName	Inventory Audit	No	__ORACO__ ActivityTasks_cWBIT	__ORACO__TasksName_c
Description	Perform Inventory Audit	No	__ORACO__ ActivityTasks_cWBIT	__ORACO__Description_c
Code	STD_ORA_INVENTORY_ AUDIT	No	__ORACO__ ActivityTasks_cWBIT	Record Name

4. Click **Next** and verify that **Scheduling** is **Immediate** and click **Next**.

5. Review the details and click **Activate**. Refresh the page.

## Import Store Visit Type

Here's how you can import the store visit type from the given CSV file:

- In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Data Import and Export
  - Task: Manage File Import Activities
- On the new page, click the new button and specify the mandatory values, and then click **Next**.

Field Name	Field Value
File Type	Text File
Upload From	Desktop
File Name	__ORACO__ActivityType_c.csv
Data Type	Comma Separated
Header Row Included	Yes

Field Name	Field Value
Predefined	Yes
Object	Sales Custom Object

3. Map these fields as specified in the table.

Column Header	Example Value	Ignore	Object	Attribute
Type Name	Store Visit	No	__ORACO__ActivityType_ cWBIT	Record Name
Description	Store Visit Type	No	__ORACO__ActivityType_ cWBIT	__ORACO__Description_c

4. Click **Next** and verify that **Scheduling** is **Immediate** and click **Next**.
5. Review the details and click **Activate**. Refresh the page.

## Associate Standard Tasks with Store Visit Type

Here's how you can associate the tasks with the store visit type:

1. On the landing page, select Store Visit Type icon and open Store Visit Record.
2. Click the Tasks subtab and select all the standard tasks.
3. Click **Done** and then click **Save and Close**.

## Configure Custom Store Visit Tasks and Types

As a sales administrator, create and manage custom store visit tasks and types. You can include standard and custom store visit tasks in store visit types. Store visit types automatically include a list of tasks from the associated type.

To create custom store visit tasks and types:

1. Click the Store Visit Tasks object on the springboard and select **Create**
2. Specify Code, Task name and Description and click **Save and Close**.
 

**Note:** To get the code, go to Application Composer, edit the custom object that you want to associate your task with, and copy the API Name. For more information about associating custom tasks with custom objects, refer to the Getting Started with Consumer Goods Implementation guide.
3. Navigate to the home page and click the Store Visit Types object and select **Create**.
4. Enter Store Visit Type Name and Description, and click **Save and Close**.  
To associate the custom tasks with the type:
5. Click **Store Visit Task** and **Add**.

6. Search and select the tasks you want to associate with the custom store visit type you created from the list of tasks.
7. Click **Save and Close**.

## Perform Implementation Tasks

You must complete these implementation tasks as a sales administrator before you use the Consumer Goods Retail application.

Review the Getting Started with Your Sales Implementation Guide for the complete list of implementation tasks for your sales application.

- Set up products
- Set up territories
- Set up accounts and contacts
- Set up promotions and promotion programs

### Set Up Products

Here's how you can set up products:

- Create or Set up Products  
To set up and use products, see [Setting Up Products](#) in the [Implementing Sales](#) guide.  
Oracle Supply Chain Cloud manages the product list prices. For more information, see [Oracle Product Value Chain Cloud Using Product Information Management](#).
- Enable Display of Unit of Measure (UOM) Values  
You must set up a profile option and set its value to Y to enable the display of UOM value on the screen for the products you set up. For more information about setting up the profile option, see the chapter on [Setting up Profile Options](#).
- Create or Import Products  
Manage the product list prices in Oracle Supply Chain Cloud. For more information, see [Oracle Product Value Chain Cloud Using Product Information Management](#).

**Note:** For products to appear in dynamic choice list fields in consumer goods, you must set their shippable and purchasable option to **Yes** in Product Information Management.

### Set Up Territories

To set up territories, see [Setting Up Sales Territories and Assignment](#) in the [Getting Started with Implementation Guide](#).

### Set Up Accounts and Contacts

To set up accounts and contacts, see [Importing Accounts and Contacts](#) in the [Getting Started with Implementation Guide](#).

For import and export management, see Importing Accounts and Importing Contacts in Understanding Import and Export Management for CX Sales and B2B Service.

## Enable Legal Entity

As a sales administrator, you create a record of legal entities using the consumer goods application. Legal entity is a recognized party with rights and responsibilities.

To set up a legal entity in consumer goods:

1. Select Legal Entity from the springboard.
2. Click **Create**.
3. Enter the values for the relevant fields and click **Save and Close**.

To set up legal entity in the sales application, see the Implementing Enterprise Structures and General Structures guide.

## Understand Enterprise Scheduler Service (ESS) Jobs

You can use Enterprise Scheduler Service (ESS) jobs to enable and schedule critical tasks.

### What's an ESS Job?

Using enterprise scheduler service jobs, you can accomplish certain tasks. Use the following table to configure the parameters for enabling and scheduling these jobs.

**Note:** Remember, a user with the ORA\_ZBS\_SALES\_ADMINISTRATOR\_JOB role can trigger the ESS jobs. When you don't use appropriate values or formats, the job fails. Check the log files for the error details.

You can run specific jobs for a select set of accounts, routes, and associated data by setting the **Segment ID** value. Jobs that support execution by segment include segment ID as a parameter in the following table. Segment commonly represents a business division or a sales market. Managing your data by segments can bring a lot of operational efficiency.

**Note:** Don't use special characters in the segment value.

ESS Job Name	Job Description	Parameters Applicable
Prepare Consumer Goods Appointment Download Document	Prepares data containing details to service appointments for each route. This job consolidates appointments beginning from the time mentioned in parameter start time up to the duration mentioned in parameter duration window in hours.	<ul style="list-style-type: none"> <li>• Start Time: Indicates the planned time for setting the consolidation of the appointments with the preferred time format of YYYY-MM-DD. The start time is</li> </ul>



ESS Job Name	Job Description	Parameters Applicable
		<p>automatically set to the current time if not provided.</p> <p><b>Note:</b> The start time must be provided in GMT.</p> <ul style="list-style-type: none"> <li>• Duration Window in Hours: Indicates the period from the start time, for which the appointments are consolidated. The default is 24 hours.</li> <li>• History Window in Months: Indicates the number of months, from the start time from which appointment-related historical data is downloaded. The default is three months.</li> <li>• Processing Group: Indicates the name of the processing group which the route belongs to.</li> <li>• Route Number: Indicates the route number for which the appointment data is being downloaded.</li> <li>• Days to Keep: Indicates the number of days for which the upload and download documents are retained.</li> <li>• Diagnostic Mode: Indicates if diagnostic mode is enabled or disabled. Enabling the diagnostic mode helps in collecting log and debugging as well.</li> <li>• Maximum Sub Processes per Process: Indicates the maximum number of sub processes to be initiated to complete processing.</li> <li>• Segment ID: Indicates the segment for which the data containing details to service appointments for each route must be prepared.</li> </ul>
Prepare Consumer Goods Route Download Document	Prepares the mobile download data of route inventories for each route.	<ul style="list-style-type: none"> <li>• Processing Group: Indicates the name of the processing group which the route belongs to.</li> <li>• Route Number: Indicates the route number for which the appointment data is being downloaded.</li> <li>• Days to Keep: Indicates the number of days for which the upload and download documents are retained.</li> <li>• Diagnostic Mode: Indicates if diagnostic mode is enabled or disabled. Enabling the diagnostic mode helps in collecting log and debugging as well.</li> <li>• Maximum Sub Processes per Process: Indicates the maximum number of sub</li> </ul>

ESS Job Name	Job Description	Parameters Applicable
		<p>processes to be initiated to complete processing.</p> <ul style="list-style-type: none"> <li>Segment ID: Indicates the segment for which the mobile download data of route inventories for each route must be prepared.</li> </ul>
Process Consumer Goods Route Upload and Prepare Upload Results Document	Processes the mobile upload data for each route and converts it to the database records including order, route inventory transactions and payments.	<ul style="list-style-type: none"> <li>Processing Group: Indicates the name of the processing group which the route belongs to.</li> <li>Route Number: Indicates the route number for which the appointment data is being downloaded.</li> </ul>
Resolve Consumer Goods Order Status	Updates the status fields of order rollup and order line rollup. This happens after processing order requests from the mobile application and order request statuses from the order management application.	
Purge Consumer Goods Direct Store Delivery Documents	Deletes the mobile upload and download data older than the time period specified in the parameter days to keep.	<ul style="list-style-type: none"> <li>Processing Group: Indicates the name of the processing group which the route belongs to.</li> <li>Route Number: Indicates the route number for which the appointment data is being downloaded.</li> <li>Days to Keep: Indicates the number of days for which the upload and download documents are retained.</li> </ul>
Generate Consumer Goods Shopping Cart Templates	Enables you to create or update shopping cart templates for each account.	<ul style="list-style-type: none"> <li>Diagnostic Mode: Indicates if diagnostic mode is enabled or disabled. Enabling the diagnostic mode helps in collecting log and debugging as well.</li> <li>Maximum Sub Processes per Process: Indicates the maximum number of sub processes to be initiated to complete processing.</li> <li>Segment ID: Indicates the segment for which account shopping cart templates should be generated.</li> </ul>
Create and Update Consumer Goods Order Rollup Records	Creates and updates the order rollup records from order requests created using the mobile application.	<ul style="list-style-type: none"> <li>Diagnostic Mode: Indicates if diagnostic mode is enabled or disabled. Enabling the diagnostic mode helps in collecting log and debugging as well.</li> <li>Maximum Sub Processes per Process: Indicates the maximum number of sub processes to be initiated to complete processing.</li> </ul>
Migrate Consumer Goods Data	Migrates corresponding consumer goods data based on the migration type specified.	<ul style="list-style-type: none"> <li>Migration Type: Indicates the type of migration that must be initiated for the job.</li> </ul>

ESS Job Name	Job Description	Parameters Applicable
Calculate Consumer Goods Promotion Cumulative Usage	Enables the calculation of consumer goods promotion cumulative usage	<ul style="list-style-type: none"> <li>Diagnostic Mode: Indicates if diagnostic mode is enabled or disabled. Enabling the diagnostic mode helps in collecting log and debugging as well.</li> <li>Segment ID: Indicates the segment for which cumulative promotion usage should be calculated.</li> </ul>
Prepare Consumer Goods Priority portfolio Attainment Calculation	Prepares the base data for priority portfolio attainment calculation.	<ul style="list-style-type: none"> <li>Account Name: Indicates the name of the account for which the job must be run.</li> <li>Priority Portfolio Name: Indicates the name of the account for which the job must be run.</li> <li>Diagnostic Mode: Indicates if diagnostic mode is enabled or disabled. Enabling the diagnostic mode helps in collecting log and debugging as well.</li> <li>Maximum Sub Processes per Process: Indicates the maximum number of sub processes to be initiated to complete processing.</li> </ul>
Inventory Audit History ( <b>AcoBulkProcessing</b> )	Provides a snapshot of all inventories associated with an account and populates the data in audit history with account inventory values.	<ul style="list-style-type: none"> <li>Attribute1 (Job Name): <b>GenerateInventoryAudit</b> Indicates the name of the job to be executed.</li> <li>Attribute2 (Diagnostic Mode): Indicates if diagnostic mode is enabled or disabled. Enabling the diagnostic mode helps in collecting log and debugging as well. Run the job with this value <b>N</b></li> <li>Attribute3 (History Window in Days): Indicates the number of days for collecting the inventory data. The default value is last 24 hours.</li> <li>Attribute4 (Processing Group): Indicates the name of the processing group which the route belongs to.</li> <li>Segment ID: Indicates the segment for which the data in audit history with account inventory values should be populated.</li> </ul>
Generate Compliance History	Provides the benefit settlement associated with the contract. Ensure you run this job after generating the compliance history and allocating the funds.	<ul style="list-style-type: none"> <li>Maximum Sub Processes per Process: Indicates the maximum number of sub processes to be initiated to complete processing.</li> <li>Diagnostic Mode: Indicates if diagnostic mode is enabled or disabled. Enabling the diagnostic mode helps in collecting log and debugging as well. Run the job with this value <b>N</b></li> <li>Segment ID: Indicates the segment for which contract benefit settlements should be generated.</li> </ul>

ESS Job Name	Job Description	Parameters Applicable
Generate Benefit Settlement	Provides the benefit settlement associated with the contract. Ensure you run this job after generating the compliance history and allocating the funds.	<ul style="list-style-type: none"> <li>Maximum Sub Processes per Process: Indicates the maximum number of sub processes to be initiated to complete processing.</li> <li>Diagnostic Mode: Indicates if diagnostic mode is enabled or disabled. Enabling the diagnostic mode helps in collecting log and debugging as well. Run the job with this value <b>N</b></li> <li>When compliance history is successful, the contract generates condition compliance history and benefit compliance history.</li> <li>Segment ID: Indicates the segment for which contract benefit settlements should be generated.</li> </ul>
Generate Consumer Goods Appointment Download Document	Run the jobs every time before running Generate Consumer Goods Appointment Download Document <ul style="list-style-type: none"> <li>Purge Consumer Goods Direct Store Delivery Documents</li> </ul>	The Job generates statistics that quantify the data distribution and storage characteristics of tables, columns, indexes, and partitions. The cost-based optimization approach uses these statistics to calculate the selectivity of predicates and to estimate the cost of each execution plan. This helps in improvising performance of Generate Consumer Goods Appointment Download Document ESS Job.  Days to keep: <b>GATHERSTATS</b>  Route Number: AppointmentDownloadAllTablesForce
PopulateStoreVisitTask ( <b>AcoBulkProcessing</b> )	Schedules store visit task to all appointments in a specified window	Attribute1 <b>PopulateStoreVisitTask</b> Indicates the name of the job to be executed.  Attribute2 ( <b>Diagnostic Mode</b> ) Indicates if diagnostic mode is enabled or disabled. Enabling the diagnostic mode helps in collecting log and debugging as well. Run the job with this value <b>N</b>  Attribute5 ( <b>UseRelativeTime</b> ) If this is set to <b>Y</b> , the following relative time parameters are used. In case of <b>N</b> , the existing absolute time parameters are used.  Attribute3 ( <b>StartDate</b> ) , If Attribute5 is <b>N</b> , this field indicates the start date for which appointments are considered or <b>Relative Start Offset in Days</b> If Attribute5 is <b>Y</b> . This field indicates the start day of the publish store visit task expressed as a number of days from the execution of the scheduled run.  Attribute4 ( <b>End date</b> ), If Attribute5 is ' <b>N</b> '. This field Indicates the end date up to which appointments are considered or <b>Relative Start Time</b> . If Attribute5 is <b>Y</b> , this field indicates Time of Day and Time Zone for the run in the <b>HH:MM</b>

ESS Job Name	Job Description	Parameters Applicable
		<p>+00:00 format where +/- 00:00 is standard time zone offset and HH is 24-hour clock as per ISO times.</p> <p>Attribute6 (<b>Relative Duration in Days</b>) indicates the duration of the period to cover expressed as a number of days from the start day. This field is valid only if Attribute5 is Y.</p> <p>Segment ID: Indicates the segment for which store visit task to all appointments in a specified window should be populated.</p>

## Schedule Recommendations and Dependencies

The jobs have certain dependencies and scheduling recommendations that must be followed for optimum results:

ESS Job	Dependent Job	Scheduling Recommendation
Enable Consumer Goods Object Extension for the Mobile Application		Sets up the consumer goods solution.
Migrate Consumer Goods Data		Enables the data migration for selected objects from an old release to the current release.
Process Consumer Goods Route Upload and Prepare Upload Results Document		Run this job after the upload XML is posted from all routes to the OSC staging table.
Create and Update Consumer Goods Order Rollup Records	Process Consumer Goods Route Upload and Prepare Upload Results Document	<p>Run this job in the following schedule:</p> <ol style="list-style-type: none"> <li>1. Process Consumer Goods Route Upload job</li> <li>2. Prepare Upload Results Document job</li> </ol> <p>Inserts all the mobile orders to the OSC.</p> <ol style="list-style-type: none"> <li>3. Create and Update Consumer Goods Order Rollup Records job</li> </ol> <p>Displays the orders.</p>
Resolve Consumer Goods Order Status	Process Consumer Goods Route Upload and Prepare Upload Results Document	<p>Run this job in the following schedule:</p> <ol style="list-style-type: none"> <li>1. Process Consumer Goods Route Upload job</li> <li>2. Prepare Upload Results Document job</li> </ol> <p>Sends all the mobile orders to the OSC.</p> <ol style="list-style-type: none"> <li>3. Resolve Consumer Goods Order Status job</li> </ol> <p>ERP syncs the order status to the OSC staging tables. After the order statuses are created in the OSC staging tables, this job must be run.</p>

ESS Job	Dependent Job	Scheduling Recommendation
Generate Consumer Goods Shopping Cart Template	<ol style="list-style-type: none"> <li>1. Process Consumer Goods Route Upload and Prepare Upload Results Document</li> <li>2. Create and Update consumer goods Order Rollup Records</li> </ol>	<p>Run this job in the following schedule:</p> <ol style="list-style-type: none"> <li>1. Process Consumer Goods Route Upload</li> <li>2. Prepare Upload Results Document jobs</li> </ol> <p>Sends all mobile orders to the OSC.</p> <ol style="list-style-type: none"> <li>3. Create and Update Consumer Goods Order Rollup Records job</li> </ol> <p>Displays the orders.</p> <ol style="list-style-type: none"> <li>4. Generate Consumer Goods Shopping Cart Templates job.</li> </ol>
Calculate Consumer Goods Promotion Cumulative Usage	<ol style="list-style-type: none"> <li>1. Process Consumer Goods Route Upload and Prepare Upload Results Document</li> <li>2. Create and Update consumer goods Order Rollup Records.</li> <li>3. Resolve Consumer Goods Order Status</li> </ol>	<p>Run this job in the following schedule:</p> <ol style="list-style-type: none"> <li>1. Process Consumer Goods Route Upload</li> <li>2. Prepare Upload Results Document jobs</li> </ol> <p>Sends all mobile orders to the OSC.</p> <ol style="list-style-type: none"> <li>3. Create and Update Consumer Goods Order Rollup Records job</li> </ol> <p>Displays the orders.</p> <ol style="list-style-type: none"> <li>4. Resolve Consumer Goods Order Status job</li> </ol> <p>Updates the latest status for all the orders.</p> <ol style="list-style-type: none"> <li>5. Calculate Consumer Goods Promotion Cumulative Usage job</li> </ol> <p>Synchronizes the counts with orders.</p>
Prepare Consumer Goods Appointment Download Document	<ol style="list-style-type: none"> <li>1. Process Consumer Goods Route Upload and Prepare Upload Results Document</li> <li>2. Create and Update consumer goods Order Rollup Records</li> <li>3. Resolve Consumer Goods Order Status</li> <li>4. Generate Consumer Goods Shopping Cart Templates</li> <li>5. Calculate Consumer Goods Promotion Cumulative Usage</li> </ol>	<p>Run this job in the following schedule:</p> <ol style="list-style-type: none"> <li>1. Process Consumer Goods Route Upload</li> <li>2. Prepare Upload Results Document jobs.</li> </ol> <p>Sends all mobile orders to the OSC.</p> <ol style="list-style-type: none"> <li>3. Create and Update Consumer Goods Order Rollup Records job</li> </ol> <p>Displays the orders.</p> <ol style="list-style-type: none"> <li>4. Resolve Consumer Goods Order Status job</li> </ol> <p>Updates the latest status for all the orders.</p> <ol style="list-style-type: none"> <li>5. Generate Consumer Goods Shopping Cart Templates job</li> </ol> <p>Generates the latest shopping cart templates.</p> <ol style="list-style-type: none"> <li>6. Calculate Consumer Goods Promotion Cumulative Usage job</li> </ol> <p>Synchronize the counts with orders.</p> <ol style="list-style-type: none"> <li>7. Prepare Consumer Goods Appointment Download Document job.</li> </ol>
Prepare Consumer Goods Route Download Document	Process Consumer Goods Route Upload and Prepare Upload Results Document	Run this job in the following schedule:

ESS Job	Dependent Job	Scheduling Recommendation
		<ol style="list-style-type: none"> <li>1. Process Consumer Goods Route Upload</li> <li>2. Prepare Upload Results Document jobs</li> </ol> <p>. This sends the route inventory transactions to the OSC staging tables.</p> <ol style="list-style-type: none"> <li>3. Prepare Consumer Goods Route Download Document job</li> </ol>
Purge Consumer Goods Direct Store Delivery Documents		<p>Run this job in the following parameters:</p> <ul style="list-style-type: none"> <li>• Run it after in three months with the Days to Keep parameter as 90 so that three months old data is retained.</li> <li>• Identify the purge interval if you don't want to retain three months download and upload package data in the application.</li> </ul>

## Enable and Schedule Enterprise Scheduler Service Jobs

Use the Enterprise Scheduler Service jobs to do certain critical tasks.

You can run these jobs for a specific segment by setting the **Segment ID** value.

Before you run or schedule jobs, you must enable them.

Here's how you can enable jobs:

1. Go to Scheduled Processes.
2. Click **Schedule New Process**.
3. Search for job **Enable Consumer Goods Object Extension for the Mobile Application** and run the job.

Once you enable jobs, you can run them or schedule to run them later.

Here's how you can schedule jobs:

1. Click the Navigator icon and click **Scheduled Processes**.
2. On the Scheduled Processes page, click **Schedule New Process**.
3. On the Schedule New Process dialog box, select Job as the Type.
4. Search for the job relevant to you from the list of jobs explained in the topic and select the job. Click **OK**.
5. On the Schedule New Process dialog box, click **OK**.

The Process Details Dialog box appears.

6. Click **Advanced**.
7. On the Schedule tab, select Using a Schedule and specify the parameters for each job (if any).
8. Click **Submit**.





# 12 Reports and Business Intelligence

## Set Up and Sync Calendar for Infolets

As an administrator, you can now set up the calendar for Sales and Target infolet and synchronize the calendar regularly.

The following steps enable you to set up and synchronize calendar for the Sales and Target infolet:

- Set up calendar with adjusting period frequency for Sales and Target infolet
- Run enterprise Scheduler to synchronize calendar

### Adjust Period Frequency

You must set up your calendar with Adjusting Period Frequency as None to display the applicable quota values in a given period.

Here's a scenario on how selecting a different adjusting period frequency can show a different value in the **Sales vs Target** infolet on the dashboard. When you set the adjusting period frequency to **Once At Year End**, your quota update on December 31 doesn't show up in Quarter 4 (Q4) in the **Sales vs Target** infolet. **Once At Year End** value treats December 31 as the adjusting period and excludes it in the Q4 which otherwise spans from October 01 to December 31. To avoid similar situations, set the adjusting period frequency to **None** when setting up your calendar.

For more information about setting up your calendar, see Set Up Common Components the Implementing Sales guide of Oracle sales application.

For more information about setting up sales quota, see Understand Sales Quota in the Implementing Sales guide or Set Up Sales Quotas in Getting Started with Your Implementation guide.

### Run Enterprise Scheduler Service to Sync Calendar

After setting up your calendar, run the Oracle Enterprise Scheduler Service as follows to synchronize your calendar with Oracle Business Intelligence (BI).

For more information about synchronizing your calendar with Oracle Business Intelligence, see the section on Run the Time Dimension Process in the Setting Up Common Components section of Implementing Sales guide.

For more information about Oracle Enterprise Scheduler, see the Oracle Fusion Applications Developer Guide for Oracle Enterprise Scheduler.

## Create Resource Hierarchies

As an administrator, you can generate correct resource hierarchies in Oracle Business Intelligence.

1. In the Setup and Maintenance work area, do the following:
  - Offering: Sales

- Functional Area: Users and Security
  - Task: Manage Resource Organization Hierarchies
2. On the Manage Resource Organization Hierarchies page, click **Search** without entering any search parameter.
  3. In the Search Results, click **Internal Resource Organization Hierarchy** row.
  4. Select **Actions > Edit**.
  5. Select **Actions > Edit This Hierarchy Version**.
  6. Click **Save and Close**. If a warning appears, click **Yes**.

## Configure Route Settlement Report

As an administrator, you can configure the route settlement reports print output based on your business requirements. Use Oracle Business Intelligence to configure the route settlement report.

Complete the following steps to configure the route settlement report according to the requirements of your organization:

1. Copy the folder containing the route settlement report files to the Custom folder.
2. Configure the print output of the route settlement report to contain the name of your organization.
3. Configure field names of the print output of the route settlement report according to the requirements of your organization.

**Note:** A profile option must be created to enabling printing of the route settlement report you just configured.

### Copy the Folder Containing the Report Files to Custom Folder

The route settlement report files are initially placed in the ORACO folder. You can't configure the files placed in the ORACO folder. Copy the route settlement report files from the ORACO folder and paste in the Custom folder before you configure the report.

To copy the route settlement report from the ORACO folder to the Custom folder:

1. Sign in to Oracle Business Intelligence Application using the BI administrator role.
2. Click **Catalog**.
3. On the Folders panel, navigate to **Shared Folders > Extension > ORACO**.
4. Copy the **Route Settlement Report** folder.
5. On the Folders panel, navigate to **Catalog > Shared Folders > Custom**.
6. Paste the Route Settlement Report folder in the Custom folder.

**Note:** Copy the location of the **Route Settlement Report > Route Settlement Report Dashboard** while configuring the profile option to print the route settlement report.

The route settlement report files have been copied from ORACO folder to the Custom folder. The route settlement report can be configured according to the requirements of your organization.

### Configure the Print Output of the Route Settlement Report

To configure the route settlement report print output to contain the name of your organization:

1. Sign in to Oracle Business Intelligence Application using the BI administrator role.

2. Click **Catalog**.
3. On the Folders panel, navigate to **Catalog, Shared Folders, Custom, Route Settlement Report**.
4. Edit the Route Settlement Report Dashboard.
5. Click **Tools** and select the **Print and Export Options** from the drop-down list.
6. On the Include area, edit **Header** and perform the following steps on the Edit Header window.
  - a. Replace the placeholder text with the name of your organization.  
 For example, if the name of your organization is Vision Corporation, replace the placeholder text 'Consumer Goods Company Name' with 'Vision Corporation'.
  - b. Click **OK**.
7. Click **OK**.
8. Click **Save**.

Configure the route settlement report to contain the name of your organization in the print output.

## Configure the Print Output of the Route Settlement Report

You can revise or translate the names of the fields in the print output of route settlement report in another language.

To configure the names of fields in the print output of the route settlement report

1. Sign in to Oracle Business Intelligence Application using the BI administrator role.
2. Click **Catalog**.
3. On the Folders panel, navigate to **Catalog > Shared Folders > Custom > Route Settlement Report**.
4. Edit the Print Route Settlement.

**CAUTION:** When you change the field name or translate into another language in the application, incorporate the changes in the Route Settlement Report folder. When you change a field name or translate in the Documents subtab, incorporate the same in the Documents analysis file. You can replace or translate the names of the fields in the prompt files. After you replace or translate the names of fields in the analyses or prompts, incorporate the same in the Print Route Settlement Dashboard file.

5. Navigate to the Results tab and select the Narrative from the Views panel.
6. Click **Edit View**.
7. The fields available on the Narrative page can be used in the following ways to configure the report:

Field Name	Use
Prefix	<p>Use the prefix to name all the sections and fields of the print output and set the layout for the print output. The print output is currently laid out according to the layout of report on the application. You can use the Prefix field to rename or remove any of the fields as required.</p> <p><b>Note:</b> If you translate the name of a field to another language, replace the name of the field with the translated term in the Prefix.</p>
Narrative	Use the Narrative to generate the value for every field provided on the print output. The value of each field is generated according to the sequence of the columns selected on the Criteria tab.

Field Name	Use
	<p><b>Note:</b> If you remove a field from the prefix, you must also remove the field's value from the Narrative. When the criteria of the report changes, incorporate the same in the Narrative.</p>

**8. Click Done > Save.**

The names of the fields in the print output of the route settlement report is configured according to the requirements of your organization.

*Related Topics*