Oracle Fusion Cloud Sales Automation

How can I modify standard Sales pages in Oracle Visual Builder Studio? Oracle Fusion Cloud Sales Automation How can I modify standard Sales pages in Oracle Visual Builder Studio?

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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

Use help icons O to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

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You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!





1 Before You Begin

Before You Modify Pages in Visual Builder Studio

Before your team can start creating application extensions, you must first set up Visual Builder Studio and configure it. You only need to complete these steps once per implementation.

Before you begin, make sure you have the following information:

• The URL of your instance of Visual Builder Studio

You can obtain the URL by navigating from your Oracle Cloud Applications development instance. From the Navigator, under **Configuration**, select **Visual Builder**.

Setting up Visual Builder Studio includes these steps:

- 1. Obtain the required roles and privileges.
- 2. Set up Visual Builder Studio users.
- 3. Create a project and workspace.

Or, create a workspace in an existing project.

4. Create the build pipeline to deploy your changes to your production environment.

Get the Required Roles and Privileges

To set up Visual Builder Studio and your Oracle Cloud Applications instances, make sure you're assigned the FND_ADMINISTER_SANDBOX_PRIV privilege. Each role listed below, for example, has this privilege:

- Application Administrator (ORA_FND_APPLICATION_ADMINISTRATOR_JOB)
- Application Developer (ORA_FND_APPLICATION_DEVELOPER_JOB)
- Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
- Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)

In addition, in order to view the **Edit Page in Visual Builder Studio** option in the Settings and Actions menu, users must be assigned the View Administration Link privilege (FND_VIEW_ADMIN_LINK_PRIV). By default, this privilege is assigned to the predefined roles listed above. Grant this privilege to custom roles, as well, where required.

Set Up Visual Builder Studio Users in IDCS

First, you must authorize users so they can access Visual Builder Studio to do extension work. You do this in Oracle Identity Cloud Service (IDCS).

To sign in to the right instance of IDCS, complete these steps:

- 1. Navigate to www.oracle.com.
- 2. Click View Accounts.
- 3. Click Sign in to Cloud.
- **4.** In the Cloud Account Name field, enter the name of your production pod, such as **cakp**. Click **Next**.



 The Oracle Cloud Account Sign In page is specific to the Cloud Portal and is separate from your test and production pods. Enter your user credentials and click Sign In, or use the Click here link to reset your password.

On the Oracle Cloud Dashboard, navigate to the Active Applications region and click **Identity Cloud**. Scroll down to view your IDCS service instances:

Identity

IDCS instance associated with the Myservices portal.

CAKP (for example)

IDCS instance associated with your production pod.

CAKPTEST (for example)

IDCS instance associated with your developer pod.

6. To sign in to the IDCS instance associated with your test environment, click the Service Instance URL for your test pod (in this example, CAKPTEST), or click the **Open Service Console** link.

Tip: Bookmark this URL so you have it for next time.

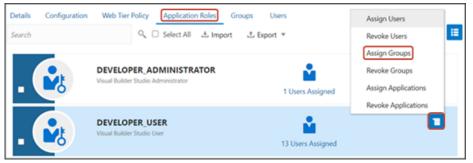
7. Sign in to IDCS directly, or click **Oracle Applications Cloud (Fusion)** at the bottom of the page to sign in using your Oracle Applications user credentials.

Once you're in the Identity Cloud Service console, you can now authorize users so they can access Visual Builder Studio. You can assign users, or groups of users, to the Visual Builder Studio administrator (DEVELOPER_ADMINISTRATOR) or Visual Builder Studio user (DEVELOPER_USER) roles. These two predefined roles are specific to working with Visual Builder Studio.

In this example, let's look at assigning a group to the Visual Builder Studio administrator

(DEVELOPER_ADMINISTRATOR) role. This is a way to provide Visual Builder Studio access to Fusion Application roles and their users.

- 1. In the Identity Cloud Service console, expand the Navigation Drawer, and then click **Oracle Cloud Services**.
- 2. Click DevServiceAppAUTO_<VBSTUDIO_INSTANCE>
- 3. Click the Application Roles tab.
- 4. On either the DEVELOPER_ADMINISTRATOR or DEVELOPER_USER row, click the menu icon, then click Assign Groups.



- 5. In the Assign Groups dialog, select the roles that you want to assign and click **OK**. For example:
 - Application Administrator
 - Sales Administrator
 - Customer Relationship Management Application Administrator



- Application Developer
- Any custom role, per your authorization plan

Users with the selected roles can now access Visual Builder Studio. Note that sometimes it may take up to 12 hours for Oracle Cloud Applications user updates to sync with IDCS.

For more information, see Set Up VB Studio Users in the Oracle Cloud Administering Visual Builder Studio guide.

Create Your Project and Workspace

If you haven't yet created a project and workpace in Visual Builder Studio, then you must do so before configuring a standard object's detail page.

• A **project** is a collection of resources that your team will use to create the application extension.

Note: The procedures in this chapter use fragments which are building blocks that help you to configure pages more quickly, with a minimal amount of manual coding. Create a new project to keep your fragment-based extension separate from extensions that don't use fragments.

• A **workspace** exists within a project, and is your private work area which connects to a Git repository, environment, and Oracle Cloud Applications sandbox.

If you **already** created a project, then you don't need to create a new one. Rather, you can create a new workspace within your existing project. See the next section.

To create a project and workspace at the same time:

- 1. In Visual Builder Studio, click the Organization side tab, then click the Projects subtab.
- 2. Click + Create.
- 3. In the New Project dialog, enter a name and description for the project.
- 4. Set the security for your project, either **Private** or **Shared**.
- 5. Click Next.
- 6. Select Empty Project as the template for this project, and click Next.
- 7. On the Properties step, click **Next**.
- 8. On the Team step, add team members and select their membership levels.
- 9. Click Finish.

Visual Builder Studio provisions your project, which could take a few minutes to complete. You will then be navigated to the project's home page.

- **10.** Create a development environment for your project.
 - a. Click the Environments side tab, then click + Create Environment.
 - b. Enter a name and description for the environment and click Create.
 - c. Click + Add Instance.
 - d. In the Add Service Instances dialog, under Instance Type, click **Oracle Cloud Applications**.
 - e. Under Authentication Method, click Identity Domain.
 - f. Select the desired instance for the environment and click Add.
- **11.** Create a new workspace.
 - a. Click the Workspaces side tab, then click **New > New Application Extension**.
 - **b.** In the New Application Extension dialog, in the Extension Name field, enter the extension name.
 - c. In the Extension Id field, enter site_cxsales_Extension.

- **d.** In the Workspace Name field, accept the default value or enter a new workspace name.
- e. In the Development Environment field, select the environment you just created.
- f. In the Base Oracle Cloud Application field, select CX Sales (from CX Sales).
- g. In the Git Repository region, click **Create new repository**.
- **h.** Enter a name for both the repository and working branch.
- i. Click Create.

Create a Workspace in an Existing Project

To create a new workspace in an existing project:

- 1. In Visual Builder Studio, click the Workspaces tab on the left pane, then click Clone from Git.
- 2. In the Clone from Git dialog, enter these values:

Field	Value
Workspace name	Enter the name of your workspace.
Repository Name	Select the Git repository connected to your team's project. Ask your administrator for this value.
Branch	Select main .
"New branch from selected" check box	Select this check box.
New branch name	Enter a name for your branch. For example, <user_id>_<feature_name></feature_name></user_id> .
Development Environment	Select your development environment.
Sandbox (optional)	Select a sandbox, or leave this blank and attach a sandbox to your workspace later.

3. Click Create.

Create the Build Pipeline for Your Production Environment

Create the build pipeline to deploy your changes to your production environment.

When you created your project, a build pipeline was automatically created to deploy your application extension to your test environment. Now you must create a second pipeline for your production environment.

For complete instructions, see *Configure VB Studio to Run CI/CD Pipelines* and *Set Up the Project to Deploy to Production* in the Oracle Cloud Administering Visual Builder Studio guide.

Related Topics

Setting Up Visual Builder Studio for Oracle Cloud Application Extensions



How can I change my project's Extension ID?

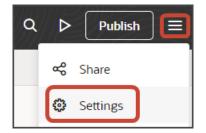
When working with a Sales application extension in Oracle Visual Builder Studio, your project's extension ID must be site_cxsales_Extension. This topic illustrates how to correct the extension ID, if required.

To change the extension ID for a project:

- 1. In Visual Builder Studio, from the left navigator, click Environments > Deployments.
- 2. Undeploy any deployments to target servers.

See Delete an Extension.

3. Navigate to your workspace and, from the upper menu, click Settings.



- 4. In the **Extension ID** field, enter site_cxsales_Extension.
- 5. Build and deploy your extension once more.

See Build Your Applications and Package, Deploy, and Manage Extensions.





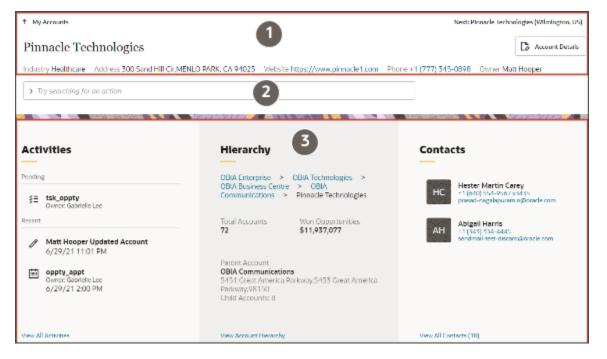
2 Configure Standard Object Pages

What You Can Configure

An individual detail page is divided into three sections: the header, the Action Bar, and a panels region (also known as the foldout). You can use Oracle Visual Builder Studio to configure a standard object's header and panels region so that the page shows the exact information that your users need. This chapter explains how to configure a standard object's detail page leveraging fragments. Fragments are building blocks that help you configure pages more quickly, with a minimal amount of manual coding.

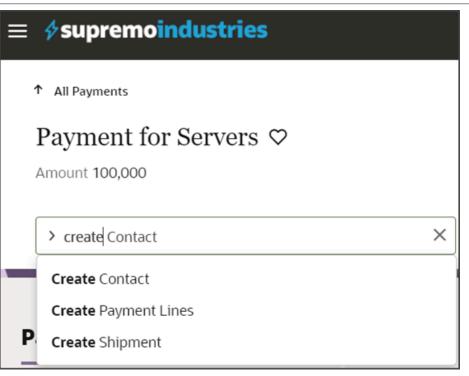
Note: In the runtime UI the detail page is called the overview page.

Here's a screenshot of the three main regions on a detail page. You can configure both the header and the panels region (callouts 1 and 3 in the screenshot). The topics in this chapter illustrate the various configuration options available.



Smart Actions in the Action Bar

The Action Bar is a field at the top of many pages where users can type keywords to access and update information, and take actions. For example, here's a screenshot of the Action Bar with suggested actions, after typing create:



Standard objects are delivered with a set of seeded smart actions, but you can create your own using Application Composer. See *Create Smart Actions*.

Note: If you previously created custom smart actions for a non-fragments implementation, then you don't need to create new smart actions for use with fragments. Instead, update existing UI-based custom smart actions to specify the action type, either **Add** or **Create**, as well as the target object and any required field mapping. For existing REST-based or object function-based smart actions that you already created, edit the action and then save without making any changes. These steps ensure that your custom smart actions still work with new fragment-based extensions.

Prerequisites

Before configuring a standard object's detail page, make sure you have a project and workspace ready in Visual Builder Studio.

For instructions about how to create a project and workspace, refer to the Before You Begin chapter.

Configure the Header on the Detail Page

The header on a record's detail page displays key details right at the top, so that users can quickly find what they need. The header displays a predefined set of attributes, but you can configure the region to display any attributes that your users are most interested in.

Where's the Header?

When you drill down to a record's detail page from a list page, the header displays at the top of the detail page.



≡ ∮supremoindustries			
↑ My Team's Accounts			
Pinnacle Technologies ♡			
Account Score 180 Industry High technology Address 3903 Ambassador Cattery PlovyLAFAYETTE, LA 70503	Website http://www.PinnacleT.com	Phone +1 (510) 878-7765	Owner Susan Morgan
➤ Try Log a Coll			

Configure the Header Region Using a Rule Set

You can modify the header using Oracle Visual Builder Studio. To modify any region on a page, you create a new rule that returns a custom layout.

In this example, let's look at adding the Type field to the header on the account detail page.

1. Navigate to the page that displays the area you want to extend.

In this example, navigate to the My Team's Accounts page and then click an account record.



- 2. To access Visual Builder Studio, you have one of two options:
 - Under the Settings and Actions menu, select Edit Page in Visual Builder Studio.

ſ	ጎ 雄 🛛	KP
Settings and Actions	Sign Out	
Personalization Set Preferences		
Administration Edit Page in Visual Bu	uilder Studio	
Troubleshooting Run Diagnostics Test	5	
Applications Help		
About This Applicatio	on	

• If you don't see the Settings and Actions menu, then in the lower right corner of the page, hover over the Ask Oracle icon and click **Edit Page in Visual Builder Studio**.

gine Fall Opportunity	Battery Backup +1 (650) 506-7000
Tesla plant fication	Solar installation
pportunities (23)	View All Leads (8)

- **3.** If you're working on multiple projects, then select the Extend Redwood CX Sales project to keep your fragments extension separate from non-fragments changes.
- **4.** If you're working in an active sandbox when you launch Visual Builder Studio, then Visual Builder Studio looks for a workspace that's associated with your sandbox. If you're not working in a sandbox, then Visual Builder Studio looks for a workspace without a sandbox. You might have to select a workspace if more than one workspace exists. If no workspace exists, then Visual Builder Studio automatically creates one for you.

5. When you enter into your workspace in Visual Builder Studio, the accounts-detail page is displayed in the Page Designer canvas.

Tip: To display more of the accounts-detail page in the canvas, collapse the left pane by clicking the App UIs tab on the left. Then, select **Desktop** or **Wide screen** from the list at the top of the Page Designer.

₽	App UIs	+	🗅 accounts-detail ×
47	Q Filter] ≡	Page Designer Actions Event Listeners Events Types Variables (3)
G	► 🖵 cx-custom	+	Steel C Filter, Alt+F = C (+) Desktop • 1024

6. Click the Design button.





7. On the Structure panel, click the **accounts - Header Layout** node.

The header is highlighted in the canvas.

۵	accounts-detail ×			
Pag	e Designer Actions Event Listeners	Events Types Variables (3) JavaScript	JSON Settings	
ents	Q, Filter, Alt+F = C	(+) Desktop • 1024 × auto 8	4% •	Live Design Code
uodu	✓ Redwood Patterns			
Comp	Bottom Drawer Template	≡ ∳ supremoindustries		o 🖑 🔤
-	El Card			
Duta	Create Edit Drawer Template	Accounts - Header Layout		
	Detail Panel)	Account Details
	C Diagram Builder	Website	-	
	C Diagram Node			
	Empty State			
	TH Garvaral Drawar Tarvorlata			
	Q, Fiter	Activities	Hierarchy	Contacts
	• 🗅 cx-detail		_	_
	 Cx-detail-impl 	You're all caught up for now.		
	accounts - Header Layout	0 1		
	Panel Container Layout		6	
	Activity Feed Panel Tem		Ŭ	
-	 Cx-feed Cx-feed-card 			
oure	Co-note		View Account Hierarchy	
drug.	Conote			
8.2	Pa	er codetal codetalized accounts Header Laund		A+9+

On the Properties pane, the rule set is also displayed.

<pre> accounts - Header Layout Application Comp </pre>	Properties
Quick Actions	ß
Page region that displays a concise Account summary on the header region of the details page.	
Suggested Actions	
← Open Rule Set Editor	
Go to cx-detail-impl	
Layout A accounts	
Object 틵 getall_accounts	
Rule Set ≶_ Header Layout	
Layout Preview	
Resolved by display logic	



8. On the Properties pane, click the **Header Layout** rule set.

The Accounts layout tab > Rule Sets subtab displays. The Rule Sets subtab includes both a default layout as well as a default rule. Let's create a new rule.

5	2	Ľ,	accounts-detail × 🏠 Accounts ×		
4	2	Rul	e Sets (20) Fields Templates (20) Actions Even	t Listeners Events (11) Types Variables Settings	
<		< 6	Rule Sets Header Layout (CX Sales) •		
E	9	ayouts	Q. Filter + Layout	Display Logic 💿	
n ^d	5	5	Your extension doesn't have any layouts defined yet	+ Rode	e
C	3		From Dependencies	Tell me more	
4	Þ		v oracle_cx_salesUI	From Dependencies (read-only)	
6	5		El default	IsDefault (XSales)	ן
•	Ъ			return 🖾 defoult 🔽	

9. Click the Duplicate Rule icon.

Display I	Logic ⑦	
	+ Rule	C Start by duplicating the built-in rule Tell me more
	From Dependencies (read-only)	4
	isDefault (CX Sales)	
♦→	ereturn 🖭 default	

10. In the Duplicate Rule dialog, accept the default rule name or enter a new name. The name you enter here is both the rule name and also the layout name, so enter a layout name that makes sense for you.

Also, make sure that the **Also create a copy of the layout** check box is selected.

Duplicate Rule	×
Name *	
isDefault_copy	
Also create a copy of the layout	
	Cancel Duplicate

11. Click **Duplicate**.

The new rule displays at the top of the list of existing rules, which means that this rule will be evaluated first at runtime. If the rule's conditions are met, then the associated layout is displayed to the user.

In this example, we're not adding any conditions which means that the associated layout will always be displayed.



12. Modify the rule's copied layout.

a. Click the Open icon to edit the copied layout.

Display	Logic 🕐					
	+ Rule					
	isDefault_copy 🖉	ð	С	~	^	団
	Click to add condition					
	return 🖽 isDefault_copy 🗸 🕻 🗙					
	From Dependencies (read-only)					
	isDefault (CX Sales)					
▲ ◇	return ei default					

- **b.** In the Filter field, enter type to locate the Type field.
- c. Drag the Type field to an available section in the header.

In our example, drag the Type field to the item7 section.

+	OOTB_configuration_2 > extend-redwood-cx-sa	/ OOTB_configuration_2 Ø
Q	🗅 accounts-detail × 🍇 Accounts ×	
47	Rule Sets (20) Fields Templates (18) Actions	Event Listeners Events (11) Types Variables JavaScript JSON Settings
0 2 0 0 0	A OrganizationTypeCode A PartyType A PhoneContactPointType D A PhoneContactPointType D I PrimaryAddress A PrimaryAddress.CurcyConvRateType A PrimaryAddress.PlouseType A PrimaryAddress.PlouseType A RegistrationType A SourceObjectType	A FormattedAddress × A Item6 Item four slot () URL_url × A Item5 () FormattedPhoneNumber_phone × A Item6
	A Type	A OwnerName × A item7 A Type Drop a field from fields polette
		A resource Drop a field from fields palette
		A titlettem Title item slot

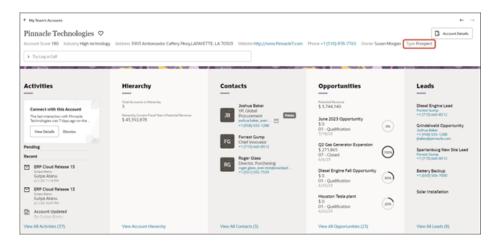
13. Click the Preview button to see your changes in your runtime test environment.





The preview link must include the application/container segments in the URL. If not, then change the preview link using the following example URL:

https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-detail? id=300000003513233&puid=7050&view=foldout



Note: The header displays a field only if the field has a value. For example, if an account doesn't have a Type specified, then the Type field won't display.

Show or Hide a Field Based on Another Field's Value

In Oracle Visual Builder Studio, you can use rules and display logic to determine which page layout to display at runtime. You can also set up your rules so that a field only displays depending on the value of another field. For example, maybe you want the Owner field to always display for an account record, unless the account type is Prospect. This topic illustrates how to implement this scenario using display logic.

This topic also provides an alternative method for simple hide/show scenarios.

Prerequisite

In this example, we'll show or hide a field based on an account's type. Before you try the following procedure, you must add the Type field to the account detail page's header using the instructions documented in *Configure the Header on the Detail Page*.

Add Display Logic to a Rule

To show a field depending on the value of another field, we'll create two rules and add a condition to the first rule, as follows:

- 1. If an account's type is Prospect, then display a layout without the Owner field.
- 2. If an account's Type is not Prospect, then display a different layout that includes the Owner field.

Let's create the rule and corresponding layout for item #1.

1. In Visual Builder Studio, on the Accounts layout tab > Rule Sets subtab, create a new rule by copying the rule that you created in the procedure documented in *Configure the Header on the Detail Page*.

Click the Duplicate icon.

٦	Display L	ogic 💿	
	\	+ Rule	
		isDefault_copy 🧷	D C ~ A 🗇
		Click to add condition	
		return 🖽 isDefault_copy 🔽 🕻 🗙	
		From Dependencies (read-only) ⑦	
		isDefault (CX Sales)	
A	~	return efault	

2. In the Duplicate Rule dialog, accept the default rule name or enter a new name. The name you enter here is both the rule name and also the layout name, so enter a layout name that makes sense for you, such as Prospect-No-Owner.

Duplicate Rule	×
Name * Prospect-No-Owner	
Also create a copy of the layout	
	Cancel Duplicate

Also, make sure the **Also create a copy of the layout** check box is selected.



3. Click **Duplicate**.

The new rule displays at the top of the list of existing rules, which means that this rule will be evaluated first at runtime. If the rule's conditions are met, then the associated layout is displayed to the user. Otherwise, the next rule will be evaluated.

4. Let's add a condition to the rule. Click **Click to add condition**.

Display L	Logic [®]
~	+ Rule
	Prospect-No-Owner
♦ →	Click to add condition
	return 🖪 Prospect-No-Owner
	isDefault_copy
A \diamond	Click to add condition
	return 🗈 isDefault_copy 🗸 👻
	From Dependencies (read-only) ③
	isDefault (CX Sales)
A \diamond	return 🕮 default

5. Add the condition to specify when you want the associated layout to display at runtime.



In this example, we want the Type field to equal Prospect.

- 6. Edit the layout so that the Owner field is not included when the account type is Prospect.
 - a. Click the Open icon to edit the copied layout.

Display	isplay Logic 💿							
\	+ Rule							
	Prospe	:t-No-Owner 🧷	٦	6	~	^	団	
•	if	<pre>\$fields.Type.value() strictly equals 'ZCA_PROSPECT'</pre>						
	return	Prospect-No-Owner						

b. Delete the Owner field in the item6 slot.

Ţ	🗅 accounts-detail × 🍇 Accounts ×	
47	Rule Sets (20) Fields Templates (20) Actions	Event Listeners Events (11) Types Variables JavaScript JSON Settings
G	A ActionsMenu	A FormattedAddress ×
8	{ } AdditionalName	A item4 litem four slot
φ	Address	() URL_url ×
ß	A AddressElementAttribute2	A item5
۲	AddressElementAttribute3	{} FormattedPhoneNumber_phone ×
۵	AddressElementAttribute4	Altemó
•	AddressLine1	A OwnerName ×
	A AddressLine2	A item7
	AddressLine4	A Type ×
	AddressLinesPhonetic	A resource
	AddressNumber	
	A AddressType	Drop a field from fields palette
	A AnalysisFiscalYear	A titleitem Title item slot
	AssignmentExceptionFlag	A OrganizationName ×

7. Click the Preview button to see your changes in your runtime test environment.



The preview link must include the application/container segments in the URL. If not, then change the preview link using the following example URL:

https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-detail? id=300000003513233&puid=7050&view=foldout

In this example, we can see that this account is a prospect, and therefore there is no Owner field.

My Team's Accounts		
Pinnacle Technologies ♡		
Account Score 180 Industry High technology Address 3903 Ambassador Caffery Plony, LAFAYETTE, LA 70503	Website http://www.PinnacleT.com	Phone +1 (510) 878-7765 Type Prospect
> Try Log a Call		

However, this account is a Customer, and thus we see the Owner field.

↑ My Team's Accounts				
Apex Graphics ♡				
Account Score 250 Industry High technology Address 7620 Eleffend Ave	FREDERICK, MD 63301 Website http://www.Apex0	Graphs.com Phone +1 (667) 555-8402	Owner Susan Morgan	Type Customer
> Try Log a Call				

Note: The header displays a field only if the field has a value. For example, if an account doesn't have a Type specified, then the Type field won't display.

Note: The rule and corresponding layout that you previously created in *Configure the Header on the Detail Page* satisfy the conditions for item #2, "If an account's Type is not Prospect, then display a different layout that includes the Owner field."

Alternative Method for Simple Hide/Show Use Cases

The previous example illustrates how to use rules, display logic, and custom layouts to show or hide a field based on another field's value. But, you can also directly modify the page template instead. This method is an alternative method that might be preferable for simple hide/show use cases.

Let's look at an example. In this next procedure, we'll hide the account's phone number if the account's industry is High Tech.

1. In Visual Builder Studio, on the Accounts layout tab > Rule Sets subtab, review the list of rules.

We can ignore the Prospect-No-Owner rule because that rule is specifically for the instance when the Type field is Prospect.

Instead, we'll edit the rule that you created in the procedure documented in *Configure the Header on the Detail Page*.

Ō	D accounts-edit x 4 Accounts x
47	Rule Sets (20) Fields Templates (20) Actions Event Listeners Events (11) Types Variables JavaScript JSON Settings
e	< Rule Sets Header Layout (CCSalis) •
8	C Filter Display Logic O
φ,	5 El isDefault_copy
8	Prospect-No-Owner
•	Prospect-No-Owner
	From Dependencies If Sfields.Type.value() strictly equals 'ZCA_PROSPECT'
	✓ oracle_cx_salesUI
•6	return 🔄 Prospect-No-Owner
	Is Default_copy
	Click to add condition
	return 🔄 isDefault_copy 🔹

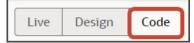
2. Click the Open icon to edit the rule's copied layout.

Display Logic 🗇						
+ Rule						
Prospect-No-Owner						
if \$fields.Type.value() strictly equals	'ZCA_PROSPECT'					
return 🖭 Prospect-No-Owner	•					
			_			-
isDefault_copy //			G	~	^	Ū
Click to add condition						
return 🕮 isDefault_copy	- 🖪 ×					
return Prospect-No-Owner			G	~	^	Ē

3. On the Properties pane, click **Go to Template**.

	G	+	
Form		≡	Pro
ID *			Properties
isDefault_copy			Š
Name			
Description			
		1.	
Form Template		Select	
Header Template Copy			
Template for page region disp Header Layout. Go to Template	olayed us	ing	

4. Click the Code button.



5. In the template editor, highlight the template tags for the header template.

₽	🗅 accounts-edit x 🐴 Accounts x		
4	Rule Sets (20) Fields Templates (20)	Actions Event Listeners Events (11) Types Variables JavaScript JSON Settings	
e	C Templates Header Template Copy •		
8	Q Filter, Alt+F	< Return to page	Live Design Code
₽ 0 0 0	 Redwood Patterns Bottom Drawer Template Create Edit Drawer Template Detail Pavel Diagram Nulder Diagram Nude Empty State C. Fitter 	1 • - Contains Dynamic UI layout templates> 2 template Id="seaf-regulate?"> template: Id="seaf-regulate?" template: Id="seaf-regulate?"> template: Id="seaf-regulate?" template: Id="seaf-regulate?"> template: Id="seaf-regulate?" template:	vb-fragmen vb-fragmen //oj-vb-fra]">mame fragment-p ragment-par
	El Template (HeaderTemplate2) Engment Container	15 (/0j-vb-fragment> 16 (/template> 17	



6. On the Properties pane, confirm the layout name.

Form Template	≡	Properties
ID		ties
HeaderTemplate2		
Title		
Header Template Copy		
Description		
Template for page region displayed using Header Layout.		
Usages		
Header Layout		
🔝 isDefault_copy		

7. In the template editor, highlight the FormattedPhoneNumber_phone parameter.

<oj-vb-fragment-param name="item5" value="[[\$fields.FormattedPhoneNumber_phone.name]]"></oj-vbfragment-param>

8. Replace the highlighted parameter with this line:

```
<oj-vb-fragment-param name="item5" value="[[ ( $fields.IndustryCode.value() =='HIGH_TECHNOLOGY') ?
null : $fields.FormattedPhoneNumber_phone.name]]"></oj-vb-fragment-param>
```



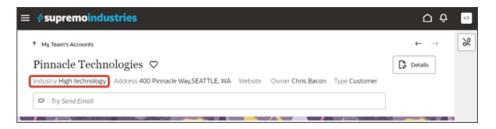
9. From the accounts-detail page, click the Preview button to see your changes in your runtime test environment.



The preview link must include the application/container segments in the URL. If not, then change the preview link using the following example URL:

https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-detail? id=300000003513233&puid=7050&view=foldout

Let's look at an account. In this example, the account's industry is **High technology**, so the phone number doesn't display in the header.



If we change the industry to **Automotive**, notice that the phone number now displays.



Note: The header displays a field only if the field has a value. For example, if an account doesn't have a Type specified, then the Type field won't display.

Configure Panels on the Detail Page

An individual record's detail page includes key information displayed in a region of panels. Panels display information related to the record, such as the most recent and pending activities or related contacts. As an administrator, you can use Oracle Visual Builder Studio to configure these panels to meet your users' requirements.

Here's an example of the panels that display for an account:



≡	ORACLE			∩¢ <u>"</u> ×
	* My Accounts			
	Pinnacle Technologies			Co Account Details
	Industry Retail Address 600 4th Ave Rm 107,SEA	TTLE, WA 98104-1850 Phone +1 (650) 998-7765 Or	iner Matt Hooper	
	> Try searching for an action			
	2512 04 104 104	1909519999 🖌 Rata and 🔤 👘 🗛	5 1997 5998	
(Activities	Hierarchy	Contacts	Opportunities
I	_	_	-	<u> </u>
	Pending	OBIA AtanTour > Pinnacle Technologies	AS AUX_NewContact16 SVC sendmail-test-discard/Boracle.com	TESTOpty_0622_001 5.4,100
		Total Accounts	seruman test-discardgronade.com	04 - Presentation 7/13/21
	Vew All Activities	View Account Hierarchy	View All Contacts (9)	View All Opportunities (79)

A different set of panels can display for different types of objects. For example, for an account, you'll probably see a hierarchy panel and a contacts panel. For an opportunity, meanwhile, you'll probably see a products panel and a team panel.

In Oracle Visual Builder Studio, these panels are rendered using a panel layout. Each Sales object has a default, readonly panel layout which you can duplicate and then configure. For example, you can:

Add and remove panels.

See Add a Panel.

• If you add a panel, then you must add a subview, as well.

See Add a Subview.

• Change the display order of the panels.

See Change the Display Order of a Panel.

• Display a panel based on a condition.

See Display a Panel Based on a User's Role and Display a Panel and Subview Based on a Field Value.

You can also configure the content inside most panels. See *Configure the Contents of a Panel*. Note, however, that you can't configure the Activities panel.

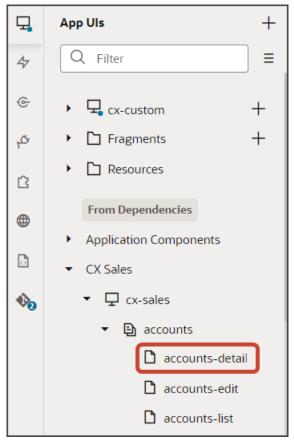
Add a Panel

Each Sales object comes with a set of panels. You can add a panel as needed.

To add a panel, you must first duplicate the object's read-only panel layout. Here's an example of duplicating the readonly panel layout for the Account detail page:

1. In Visual Builder Studio, navigate to the Page Designer tab on the accounts-detail page.

You can navigate to the accounts-detail page either by navigating to Visual Builder Studio from the Account detail page in the application, or by navigating to the accounts-detail node on the App UIs tab in Visual Builder Studio.

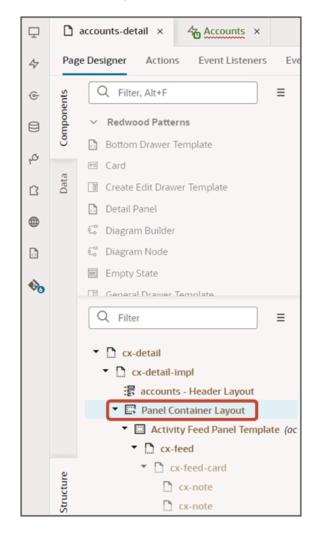


2. Click the Design button.





3. On the Structure panel, click the **Panel Container Layout** node.





4. On the Properties pane, next to **Case 1**, click the Duplicate icon.

Panel Container Layout Application Comp	Propertie
General Sections (16)	erties
Display Logic	
← ← Case	
From Dependencies (Read-only)	
↔ Case 1 🛛 🔊 🕒	
Condition	
Always Show	
Sections	
Activity Feed Panel Template CX Sales	
Hierarchy Panel Template CX Sales	
Account Contact Panel Template CX Sales	
Opportunity Panel Template CX Sales	
Leads Panel Template CX Sales	
Unknown Template	
Unknown Template	
Service Requests Panel Template CX Sales	
Assets Panel Template CX Sales	
Account Team Panel CX Sales	

After duplicating the panel container layout, you can now add a panel. There are different procedures to follow depending on the panel object (is it a standard or custom object?) as well as on the type of relationship between the two objects.

- 1. If the relationship between the detail page's object and the panel object is one-to-many, and the panel's target related object is a standard object, then see *Add a Standard Object Panel for Related Objects (One-to-Many)*.
- 2. If the relationship between the detail page's object and the panel object is one-to-many, and the panel's target related object is a custom object, then see *Add a Custom Object Panel for Related Objects (One-to-Many)*.
- **3.** If the relationship between the detail page's object and the panel object is many-to-many, then see *Add a Panel for Related Objects (Many-to-Many)*.

These instructions apply whether the panel object is a standard or custom object.

Note: After adding a panel, you must also add a related subview for the panel. See the next section, Add a Subview.



Add a Subview

If you add a panel to an object's detail page, then you must also add a related subview for the panel. The subview displays all records that can't fit into the limited size of the panel.

Before you can add a subview, you must first duplicate the object's read-only subview layout. Here's an example of duplicating the read-only subview layout for the Account detail page.

1. In your application, navigate to any record for the object that you just added a panel to.

For example, navigate to any account detail page.

Note: You must start from an application page first, before navigating to Visual Builder Studio. This ensures that the **Subview Container Layout** node is available, which you'll use in step 6.

2. On the account detail page, click the View All link at the bottom of any panel to navigate to the panel's subview.

≣ ∲!	supremoindustries		
Pin	y Team's Accounts nnacle Technologies ♥ stry Telecommunications Address 40 Try Help Drawer	0 Pinnacle Way,SEATTLE, WA Phone +1 (650	1) 506-7000 Owner Chris Bacon
_	tivities	Hierarchy	Contacts
Peno ≸≣	ding quote proposal to Blak Ontee Nancy Hung 3/6/23 3/6/23	Total Accounts in menarchy 1	Cole Mitchell Director + 1 (e50) 506-7000 Bob Flanders
Rece	ent		BF Innovation Director bob.flanders@4development1
P	Review Author Nancy Hung 9/22/23 8:11 PM		Jason T Manager Jagtest.com 1/(22)154-0789 28
G G	Updates needed Author Nancy Hung 9/22/23 7:50 PM Notes to review with		GA Grady A Sustainable Manager GradyA@exchangeo.onmicroso +1(c48) 920-1021
₹Ξ	Autor Nancy Hung 9/20/23 6:11 PM Send an Intro Email David Goldgof		Elena Maldonado Teller elena gmaldonado@wellsfargo +1 (972) 359-2300
View	All Activities (87)	View Account Hierarchy	View All Contacts (9)



3. On the subview, under the Settings and Actions menu, select Edit Page in Visual Builder Studio.

My Team's Accounts			Settings and Sign C Actions
	logies ♡ : Contacts	+1 (650) 506-7000 Owner Chris Bacon	Personalization Set Preferences
> Try Help Drawer			Administration Edit Page in Visual Builder Studio
← Go to Overview			Troubleshooting Run Diagnostics Tests
← Go to Overview			
← Go to Overview Name ≎	Contact Job Title 🗘	Phone Number 0	Run Diagnostics Tests
	Contact Job Title O	Phone Number	Run Diagnostics Tests Applications Help
Name 0		Phone Number 0	Run Diagnostics Tests Applications Help About This Application

- 4. When you enter into your workspace in Visual Builder Studio, the accounts-detail page is displayed in the Page Designer canvas.
- 5. Click the Design button.





6. On the Structure panel, click the **Subview Container Layout** node.

D	accounts-detail ×				
Pag	ge Designer Actions Event Listeners	Event			
ints	Q Filter, Alt+F	≡			
Components	✓ Redwood Patterns				
Con	Bottom Drawer Template				
-	🛗 Calendar				
Data	E Card				
	🔲 Create Edit Drawer Template				
	Detail Panel				
	🛱 Diagram Builder				
	😴 Diagram Node				
	E				
	Q Filter	≡			
	- D - 1 - 1				
	 cx-detail cx-detail-impl 				
	accounts - Header Layout				
	Panel Container Layout				
	🕨 🖾 Subview Container Layout				



7. On the Properties pane, next to **Subview Container Layout**, click the Duplicate icon.

Subview Container Layout	Properties
General Sections (20)	ties
Display Logic	
From Dependencies (Read-only)	
Subview Container Layout ⊚	
Condition	
Always Show	
Sections	
Unknown Template	
Private Notes Template CX Sales	
Activity Feed Subview CX Sales	
Account Contact Subview Template	
Opportunity Subview Template CX Sales	
Leads Subview Template CX Sales	
Service Request Subview Template	
Assets Subview Template CX Sales	

After duplicating the read-only subview container layout, you can now add a subview. There are different procedures to follow depending on the subview object (is it a standard or custom object?) as well as on the type of relationship between the two objects.

- 1. If the relationship between the detail page's object and the subview object is one-to-many, and the subview's target related object is a standard object, then see the example documented in "Add a Subview for the Leads Panel" inside the *Add a Standard Object Panel for Related Objects (One-to-Many)* topic.
- If the relationship between the detail page's object and the subview object is one-to-many, and the subview's target related object is a custom object, then see "Configure the Subview Layout" inside the Configure the Subview for Related Objects (One-to-Many) topic.
- **3.** If the relationship between the detail page's object and the subview object is many-to-many, then see "Configure the Subview Layout" inside the *Configure the Subview for Related Objects (Many-to-Many)* topic.

These instructions apply whether the subview object is a standard or custom object.



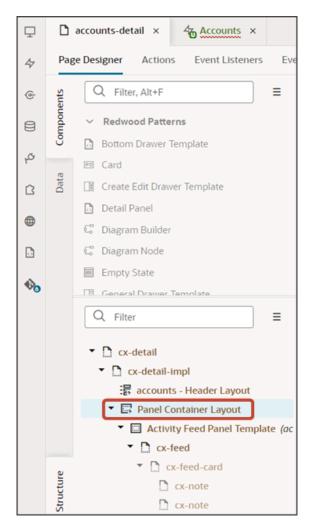
Change the Display Order of a Panel

In this example, we'll move the Activities panel for an account so that it displays after the Hierarchy panel.

- 1. In Visual Builder Studio, navigate to the Page Designer tab on the accounts-detail page.
- **2.** Click the Design button.



3. On the Structure panel, click the **Panel Container Layout** node.





4. On the Properties pane, next to **Case 1**, click the Duplicate icon.

Application Comp Application Comp	Propertie
General Sections (16)	erties
Display Logic	
← + Case	
From Dependencies (Read-only)	
↔ Case 1 ⊗ 🕒	
Condition	
Always Show	
Sections	
Activity Feed Panel Template CX Sales	
Hierarchy Panel Template CX Sales	
Account Contact Panel Template CX Sales	
Opportunity Panel Template CX Sales	
Leads Panel Template CX Sales	
Unknown Template	
Unknown Template	
Service Requests Panel CX Sales CX Sales	
Assets Panel Template CX Sales	
Account Team Panel (CX Sales)	



5. On the Properties pane for the copied layout, next to the Activity Feed Panel Template section, click the Move Down icon so that this section displays after the Hierarchy Panel Template section.

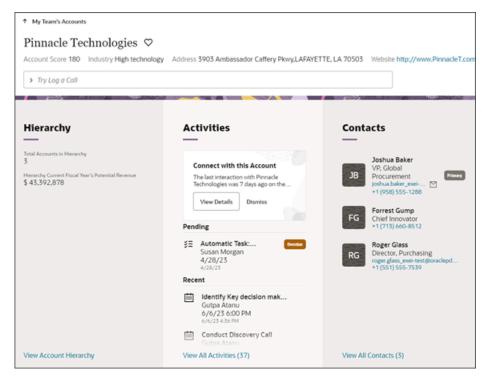
Applic Applic	ation Comp	Properties
General Sections		erties
Display Logic		
+ Case		
Case 1 (Copy)	© ₽ :	
Condition ?	fx 👻	
Always Show		
Sections	+	
Activity Feed Panel CX Sales E Template	^ 💌 🗇	
Hierarchy Panel CX Sales Template		
Account Contact Panel Template		



6. Click the Preview button to see your changes in your runtime test environment.



Here's a screenshot of the Activities panel which now displays right after the Hierarchy panel.



Related Topics

- Display a Panel Based on a User's Role
- Display a Panel and Subview Based on a Field Value

Display a Panel Based on a User's Role

To display a panel based on a user's role, you have two options: one option for a simple hide/show of a panel and a second option for more complicated scenarios such as reordering panels.

First, let's configure the panel region so that the Hierarchy panel displays only to sales managers, not sales representatives. This example is a simple hide/show use case, so it's easiest to update the accounts-detail page's JSON with the condition.

In the accounts-detail page's JSON, indicate that the Hierarchy panel must not display for sales representatives.

- In Visual Builder Studio, click the App UIs side tab.
- 2. Navigate CX Sales > cx-sales > accounts > accounts-detail.
- 3. On the accounts-detail page, click the JSON subtab.
- Scroll to the "/PanelsContainerLayout" section.

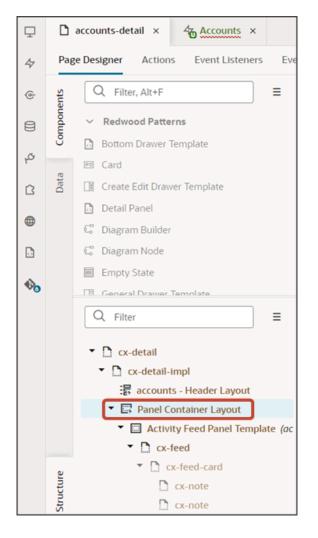
5. Replace the "accountHierarchyPanel" panel with the following expression:

```
"[[cxcore.utils.userInfo.getRoles().includes('ORA_ZBS_INSIDE_SALES_REPRESENTATIVE_JOB') ? null:
accountHierarchyPanel]]",
```



For more complex changes like reordering panels based on a user's role, you must create a panel layout with the new sequence and add a condition. For example, for the Case 1 (Copy) panel layout that we previously created, add the sales manager condition. This means that only sales managers can view the panel layout where the Activities panel displays after the Hierarchy panel.

- 1. Navigate to the Page Designer tab on the accounts-detail page.
- 2. On the Structure panel, click the Panel Container Layout node.





3. On the Properties pane, next to **Case 1**, click the Duplicate icon.

Application Comp Application Comp	Propertie
General Sections (16)	erties
Display Logic	
← + Case	
From Dependencies (Read-only)	
↔ Case 1	
Condition	
Always Show	
Sections	
Activity Feed Panel Template CX Sales	
Hierarchy Panel Template CX Sales	
Account Contact Panel Template CX Sales	
Opportunity Panel Template CX Sales	
Leads Panel Template CX Sales	
Unknown Template	
Unknown Template	
Service Requests Panel CX Sales	
Assets Panel Template CX Sales	
Account Team Panel CX Sales	



4. Next to the Case 1 (Copy) panel layout's condition, click the Expression Editor icon.

Panel Container Layout Application Comp	Properties
General Sections (16)	ertie
<u> </u>	s
Display Logic	
+ Case	
↔ Case 1 (Copy)	
Condition ⑦ fx •	
Always Show	
Sections +	
Unknown Template	
Activity Feed Panel CX Sales Template	
Account Contact Panel Template	

5. In the Expression Editor dialog, enter this expression:

cxcore.utils.userInfo.getRoles().includes('ORA_ZBS_INSIDE_SALES_MANAGER_JOB')

Q. Filter • Extension A path	1 cxcore.utils.userInfo.getRoles().includes('ORA_ZBS_INSIDE_SALES_MANAGER_XOB')		
		Cancel	Save

6. Click Save.

7. Let's test the sales representative change.

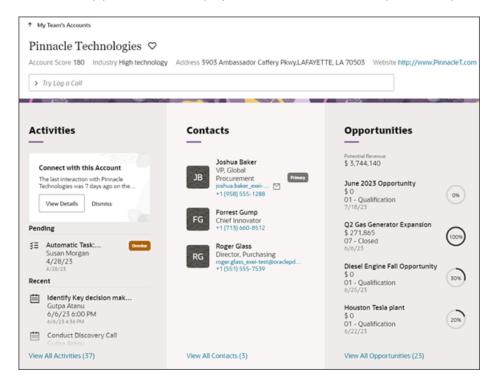
Click the Preview button to see your changes in your runtime test environment.



The preview link must include the application/container segments in the URL. If not, then change the preview link using the following example URL:

https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-detail? id=300000003513233&puid=7050&view=foldout

Here's a screenshot where the logged-in user is a sales representative. Notice that, on the account detail page, the Hierarchy panel doesn't display. This is due to the JSON update that you made previously.



Next, try signing in as a sales manager. On an account detail page, the Activities panel should display after the Hierarchy panel.

Display a Panel and Subview Based on a Field Value

You can display different sets of panels (and their corresponding subviews) based on the value of a field.

To do this, create a panel layout or subview layout, and then add a field value condition. If a record's field matches the specified value, then the associated layout displays. If not, then a different layout displays.



This topic illustrates how an account's type, either Customer or Prospect, changes the panel and subview layout on an account detail page.

Prerequisite

To create a layout condition that references a field value, you must first enable this feature so that panels and subviews are loaded to the page only after evaluating the header.

- 1. In Visual Builder Studio, click the App UIs side tab.
- 2. Navigate CX Sales > cx-sales > accounts > accounts-detail.
- 3. On the accounts-detail page, click the Variables subtab.
- **4.** In the Constants region, click the **deferRelatedDataLoad** constant.
- 5. On the Properties pane, in the Default Value field, select **True**.

If you want to add a field value condition to panel and subview container layouts, then you must set this value to true.

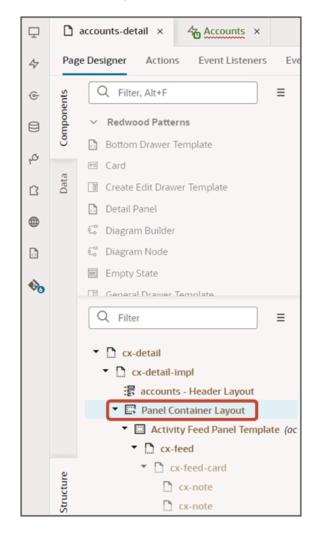
Create a New Panel Layout

Once you have enabled the feature, you can now add a field value condition to a panel layout. Let's add a condition to the account detail page.

- 1. Navigate to Visual Builder Studio from an account record.
- 2. On the accounts-detail page, click the Page Designer subtab.



3. On the Structure panel, click the **Panel Container Layout** node.





4. On the Properties pane, next to **Sales Admin Case**, click the Duplicate icon.

	Panel Container Layout eral Sections (16)	Application Comp	Properties
	From Dependencies (Re	ead-only)	
\diamond	Sales Admin Case	e 💿 🕒	
	Condition ?		
	cxcore.utils.userInfo.	getRoles().includes(
	Sections		
	Duplicate Account Pa Template	CX Sales	
	Opportunity Panel Template	CX Sales	
	Linked Account Pane Template	CX Sales	
	subscriptions Panel Template	CX Sales	
	Invoices Panel Templ	ate CX Sales	
	Account Team Panel Template	CX Sales	

5. Next to the Sales Admin Case (Copy) panel layout's condition, click the Expression Editor icon.



6. In the Expression Editor dialog, replace the existing expression with this new one, just for testing:

\$base.page.variables.row.Type=='ZCA_CUSTOMER'

7. Click Save.



8. Delete the Opportunity Panel Template.

With the field condition specified above, this means that accounts of type Customer won't see the Opportunities panel on the account detail page.

Panel Container Layout Application Comp	Properties
General Sections (16)	erties
Sales Admin Case (Copy)	
Condition ⑦ fx •	
\$base.page.variables.row.Type=='ZCA_C	
Sections +	
Duplicate Account Panel Template	
Opportunity Panel CX Sales 🗈 🖍 🗸 🔟 Template	
Linked Account Panel Template	
subscriptions Panel CX Sales Template	
Invoices Panel CX Sales Template	
Account Team Panel Template	

9. Let's test this change.

From the accounts-list page, click the Preview button to see your changes in your runtime test environment.



10. The resulting preview link will be:

https://<servername>/fscmUI/redwood/cx-sales/accounts/accounts-list

11. Change the preview link as follows:

https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-list

Note: You must add /application/container to the preview link.

12. On the My Team's Accounts page, click any account.

^o If the account is of type Customer, then you won't see the Opportunities panel.

≡				
My Team's Accounts				
Pinnacle Technologies Image: Content of the second sec				
Duplicate Accounts As you add duplicate account records, you'll see them here.	Linked Customers As you add financial customer records, you'll see them here.	Subscriptions After the first subscription is created, you can view the summary information here.		

• If the account is of type Prospect, then the Opportunities panel does display.

* My Team's Accounts				
Pinnacle Technologies Owner Martin Hoope Type Prospect Type Create Contact				
Duplicate Accounts	Opportunities	$\overline{}$	Linked Customers	Subscriptions
As you add duplicate account records, you'll see them here.	Open Opportunity 9 2.277.748 Solar (Popyrate 2 250,000 9 1.2021	(3) (3) (3)	As you add financial customer records, you'll see them here.	After the first subscription is created, you can view the summary information here.

Create a New Subview Layout

Next, add the field condition to the subview layout, as well. It's important to add the field condition to the subview layout. Otherwise, the Show Opportunities smart action is still available from the Action Bar even when the account is a customer.

≡ <i>∲</i> supremoindustries		
My Team's Accounts		
Pinnacle Technologies ♡ Owner Martin Hoope Type Customer		
O show opportunities		×
Show Opportunities		
Filter show opp		
Duplicate Accounts	Linked Customers	Subscriptions
—	—	_
As you add duplicate account	As you add financial customer	After the first subscription is
records, you'll see them here.	records, you'll see them here.	created, you can view the summary information here.

- 1. Navigate to Visual Builder Studio from any subview page, which you can navigate to from any panel on an account record.
- 2. On the accounts-detail page, click the Page Designer subtab.
- **3.** On the Structure panel, click the **Subview Container Layout** node.
- 4. On the Properties pane, next to Subview Container Layout, click the Duplicate icon.
- 5. Next to the Subview Container Layout (Copy) subview layout's condition, click the Expression Editor icon.
- 6. In the Expression Editor dialog, add this expression:

\$base.page.variables.row.Type=='ZCA_CUSTOMER'

- 7. Click Save.
- 8. Delete the Opportunity Subview Template.

With the field condition specified above, this means that accounts of type Customer won't see the Show Opportunities smart action on the account detail page.

9. Let's test this change.

From the accounts-list page, click the Preview button to see your changes in your runtime test environment.



10. The resulting preview link will be:

https://<servername>/fscmUI/redwood/cx-sales/accounts/accounts-list

11. Change the preview link as follows:

https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-list

Note: You must add /application/container to the preview link.



12. On the My Team's Accounts page, click any account and make sure that the account is of type Customer. The Opportunities panel shouldn't display.

My Team's Accounts		
Pinnacle Technologies Image: Comparison of the second se		
Duplicate Accounts	Linked Customers	Subscriptions
As you add duplicate account records, you'll see them here.	As you add financial customer records, you'll see them here.	After the first subscription is created, you can view the summary information here.

13. Test the field condition on the subview layout by checking to see if the Show Opportunities smart action is still available from the Action Bar. It shouldn't be visible anymore if the account is a customer.

My Team's Accounts				
Pinnacle Technologies Owner Martin Hoope Type Customer ishow opp Fitter show opp				
Duplicate Accounts As you add duplicate account records, you'll see them here.	Linked Customers As you add financial customer records, you'll see them here.	Subscriptions After the first subscription is created, you can view the summary information here.		

Configure the Contents of a Panel

An individual record's detail page includes key information displayed in a region of panels. Each panel contains information related to the record, such as related contacts and opportunities. Most panels display information in a list format. You can configure these lists using Oracle Visual Builder Studio.

Note, however, that you can't configure the Activities panel.

What's Inside a Panel?

A panel often contains a list, which you can configure. Here's an example of a list inside a panel:



≡ ∳ supremoindustries				o 🦑
My Insert-Assumes Pinnacle Technologies Account Score 180 Industry High technology TyrLog o Call	Address \$905 Ambassador Cattery Provy,LAFAY	ETTE LA 70505 Intolite http://www.PrivadeT.com	Phone = 1 (\$10) 878-7765 Owner Susan Margan	Accessed Details
Activities Cenerct with this Account The Lar structure with threads The Lar structure Constructure Con	Hierarchy Tead Account is in the works 2 Sector Count of Native Proceeding Homeson 5 445,592,875	Sector Provide Provide	Opportunities	Leads Sector Se

Lists can display up to 5 records, depending on screen size. If the screen size is small, then the list automatically adjusts to display fewer records. However, users can click the View All link that displays at the bottom of the panel to navigate to a second page to see all records in the list. This second page is called the subview.

What Can You Change in a List?

In Visual Builder Studio, you can modify the information that displays in each list.

You can:

- Add and remove fields
- · Change the display order of fields in the list

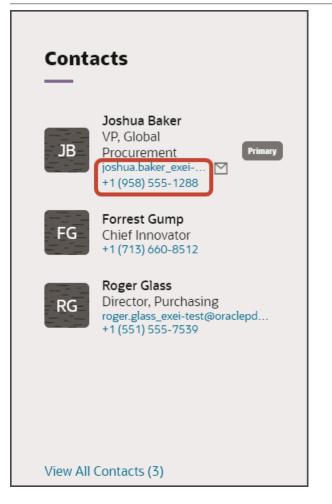
This topic illustrates how to change the display order of fields that display on panels on an account's detail page. We'll look at both the Contacts panel and Opportunities panel.

To configure the subview, see *Configure the Subview Layout*.

Change the Display Order of Contact Panel Fields

Let's change the display order of fields in a panel list. In this example, we'll switch the order of the email and phone number fields on the Contacts panel on the Account detail page.



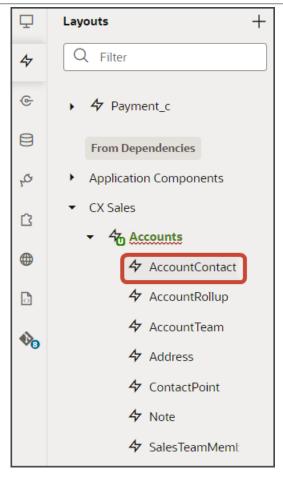


1. In Visual Builder Studio, navigate to the Layouts tab and expand the CX Sales node > Accounts > AccountContact.

The AccountContact node contains the rule sets for the Contacts panel on the Account object.



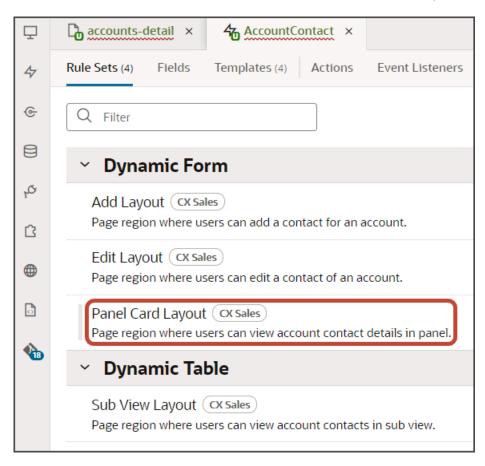
Oracle Fusion Cloud Sales Automation How can I modify standard Sales pages in Oracle Visual Builder Studio?



Note: When configuring the contents of a panel, consider what kind of relationship the panel's object has with the primary object. In this case, the Account object has a many-to-many relationship with Contact. This means that you'll find layouts for the Contact object on the AccountContact node, nested under the Accounts node.



2. On the AccountContact tab > Rule Sets subtab, click the Panel Card Layout.



Both a default layout as well as a default rule are displayed for the Panel Card Layout.

Ō	D ;	accounts-detail × & AccountContact ×		
47	Rule	e Sets (4) Fields Templates (3) Actions	Event Listeners Events (i) Types Variables JavaScript JSON Settings	
G	< R	Aule Sets Panel Card Layout (CCSales) •		
8	outs	Q. Filter + G	Display Logic 🗇	
ø	5	Your extension doesn't have any layouts defined y	+ Rule	Start by duplicating the built-in rule
8		From Dependencies		Tell me more
۲		v oracle_cx_salesUI	From Dependencies (read-only)	4
D		E default	IsDefault (CKSales)	ß
•			🔶 🛶 return 🗄 default 🖸	

3. Click the Duplicate Rule icon.

Display L	ogic 🗇	
	+ Rule	C Start by duplicating the built-in rule Tell me more
	From Dependencies (read-only)	4
	isDefault (CX Sales)	G
	return et default	

4. In the Duplicate Rule dialog, accept the default rule name or enter a new name. The name you enter here is both the rule name and also the layout name, so enter a layout name that makes sense for you.

Also, make sure that the **Also create a copy of the layout** check box is selected.

Duplicate Rule	×
Name *	
Also create a copy of the layout	
	Cancel Duplicate

5. Click Duplicate.

The new rule displays at the top of the list of existing rules, which means that this rule will be evaluated first at runtime. If the rule's conditions are met, then the associated layout is displayed to the user.

In this example, we're not adding any conditions which means that the associated layout will always be displayed.



6. Modify the rule's copied layout.

a. Click the Open icon to edit the copied layout.

Display Logic 💿						
\	+ Rule					
	isDefault_copy 🖉	٦	G	~	^	団
↓	Click to add condition					
	return 🖽 isDefault_copy 🔽 🖿 🗋 🗙					
	From Dependencies (read-only) ⑦					
	isDefault (CX Sales)					
▲ ◇	return 🖭 default					

b. Scroll down the list of fields in the layout until you locate the email and phone fields.

₽	Contract ×	
4		ent Listeners Events (6) Types Variables JavaScript JSON Settings
œ	A ContactPartyNumber	A item1
8	A ContactSourceSystemReferenceValue	{} ContactName_hyperlink ×
.e	A CreatedBy	A item2
~	A CreatedByModule	A PersonJobTitle ×
8	A CreationDate	X . comatrine x
۲	DecisionMakerFlag	A item3
	A Department	{} EmailAddress_email ×
~	A DepartmentCode	
1	DoCallFlag	A item4
	DoEmailFlag	{ } FormattedPhoneNumber_phone ×
	DoNotCallFlag	
	DoNotEmailFlag	A item5 item5 only works with style as 'label-card'
	A EmailAddress	Drop a field from fields palette
	🗹 () EmailAddress_email	A stude. Describle unbuse of easts exert or apropu

c. Delete each field from the Item3 and Item4 slots, and then add the fields back. This time, however, switch the order so that the phone field is in the Item3 slot and the email field is in the Item4 slot.

Oracle Fusion Cloud Sales Automation How can I modify standard Sales pages in Oracle Visual Builder Studio?

Ţ	Contract ×	
47	Rule Sets (4) Fields Templates (4) Actions	Event Listeners Events (6) Types Variables JavaScript JSON Settings
œ	A CreatedBy	A item1
e	A CreatedByModule	{ } ContactName_hyperlink ×
	A CreationDate	
40	DecisionMakerFlag	A item2
8	A Department	A PersonJobTitle ×
	A DepartmentCode	
•	DoCallFlag	A item3
	DoEmailFlag	{ } FormattedPhoneNumber_phone ×
	DoNotCallFlag	A item4
	DoNotEmailFlag	
	A EmailAddress	{ } EmailAddress_email ×
	{ } EmailAddress_email	A item5 item5 only works with style as 'label-card'
	EmailVerificationDate	Drop a field from fields polette
	A EmailVerificationStatus	Didy of perception print perception

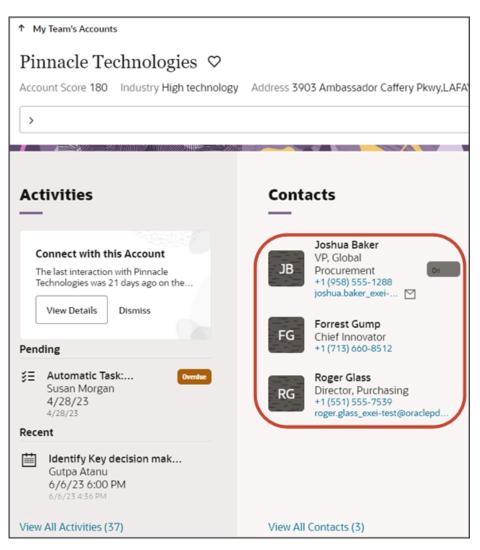


7. Click the Preview button to see your changes in your runtime test environment.



The preview link must include the application/container segments in the URL. If not, then change the preview link using the following example URL:

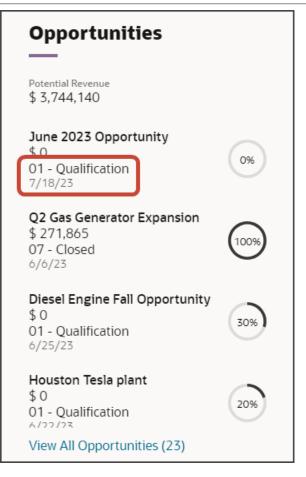
https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-detail? id=300000003513233&puid=7050&view=foldout



Change the Display Order of Opportunity Panel Fields

In this example, we'll switch the order of the sales stage and effective date fields on the Opportunities panel on the Account object.

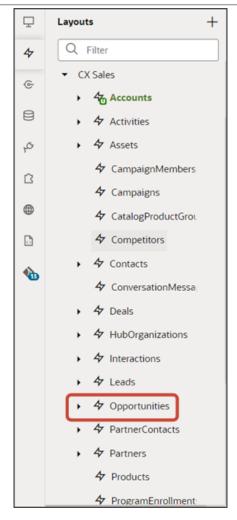




1. In Visual Builder Studio, navigate to the Layouts tab and expand the CX Sales node > Opportunities.

The Opportunities node contains the rule sets for the Opportunities panel on the Account object.

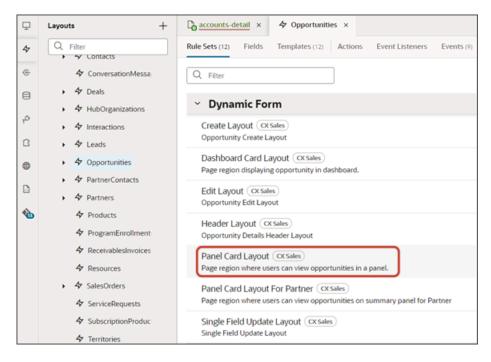




Note: When configuring the contents of a panel, consider what kind of relationship the panel's object has with the primary object. In this case, the Account object has a one-to-many relationship with Opportunity. This means that you'll find layouts for the Opportunity object on the Opportunities node.



2. On the Opportunities tab > Rule Sets subtab, click the Panel Card Layout.



Both a default layout as well as a default rule are displayed for the Panel Card Layout.

Q	G	accounts-detail × & Opportunities ×		
4	Rul	e Sets (12) Fields Templates (12) Actions Even	t Listeners Events (*) Types Variables JavaScript JSON Settings	
e	<	Rule Sets Panel Card Layout CX Sales +		
8	youts	Q. Filter + Layout	Display Logic 🗇	
φ	5	Your extension doesn't have any layouts defined yet	+ Rule	Start by duplicating the built-in rule
ß		From Dependencies		Tell me more
0		v oracle_cx_salesUI	From Dependencies (read-only)	4
D		defouit	IsDefault3 (XSiles)	6
•			return 🗄 default 🕞	
			-	

3. Click the Duplicate Rule icon.

Display L	ogic 🗇	
	+ Rule From Dependencies (read-only) ⑦	C Start by duplicating the built-in rule Tell me more
	isDefault3 (CX Sales)	
	return 🔛 default	



4. In the Duplicate Rule dialog, accept the default rule name or enter a new name. The name you enter here is both the rule name and also the layout name, so enter a layout name that makes sense for you.

Also, make sure that the **Also create a copy of the layout** check box is selected.

Duplicate Rule	×
Name * isDefault3_copy	
Also create a copy of the layout	
	Cancel Duplicate
	Cancel Duplicate

5. Click Duplicate.

The new rule displays at the top of the list of existing rules, which means that this rule will be evaluated first at runtime. If the rule's conditions are met, then the associated layout is displayed to the user.

In this example, we're not adding any conditions which means that the associated layout will always be displayed.



- 6. Modify the rule's copied layout.
 - a. Click the Open icon to edit the copied layout.

Display L	Display Logic 💿						
\	+ Rule						
	isDefault3_copy 🖉		6	~	^	۵	
	Click to add condition						
	return 🕮 isDefault3_copy 🛛 🕶 💽 ×						
	From Dependencies (read-only) ⑦						
	isDefault3 (X Sales)						
▲ ◇	return 🖭 default						

b. Scroll down the list of fields in the layout until you locate the sales stage and effective date fields.

Ţ	accounts-detail × 4 Opportunities	< li
47	Rule Sets (12) Fields Templates (12) Ad	tions Event Listeners Events (9) Types Variables
e	A BdgtAmount	A item1
	A BdgtAmtCurcyCd	{} Name_hyperlink ×
8	BudgetAvailableDate	
o,	BudgetedFlag	A item2
ß	ChampionFlag	A Revenue ×
	ChildRevenue	
•	A ClosePeriod	A item3
6	A Comments	A SalesStage ×
•	A CreatedBy	A item4
	A CreationDate	EffectiveDate ×

c. Delete each field from the Item3 and Item4 slots, and then add the fields back but switch the order.

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₽	accounts-detail ×		ş ×
47	Rule Sets (12) Fields	Templates (13)	Actions Event Listeners Events (9)
¢	A Revenue		{ } Name_hyperlink ×
8	{ } Revenue	,	A item2
۰ ⁴	A RiskLevel		A Revenue ×
ß	A SalesAcco	ountUniqueName	
•	□ A SalesCha □ A SalesMet		A item3
6	A SalesMet	hodld	A item4
	🗹 🗛 SalesStag	ge	
	A SalesStag	geld	A SalesStage ×



7. Click the Preview button to see your changes in your runtime test environment.



The preview link must include the application/container segments in the URL. If not, then change the preview link using the following example URL:

https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-detail? id=300000003513233&puid=7050&view=foldout

↑ My Tearris Accounts Pinnacle Technologies ♥		
-		AYETTE, LA 70503 Website http://www.PinnacleT.co
> Try Log a Call		
Activities —	Contacts —	Opportunities —
Connect with this Account The last interaction with Pinnacle Technologies was 21 days ago on the View Details Dramiss	Joshua Baker VP, Global Procurement +1 (958) 555-1288 joshua baker_overi	Potential Revenue \$ 3,744,140 Oune 2023 Opportunity \$ 0 7/18/23 01 - Qualification
Pending Recent	+1 (713) 660-8512 Roger Glass	Q2 Gas Generator Expansion \$ 271,865 6/6/23 07 - Closed
Account Updated By Gutpa Atanu 6/1/23 9:52 PM	RG Director, Purchasing +1 (551)55-7539 roger.glass_exel-test@oraclepd	Diesel Engine Fall Opportunity \$ 0 \$ 0/25/23 01 - Qualification
		Houston Tesla plant \$ 0 6/22/23 4 - Qualification

Configure the Subview Layout

An object's detail page includes a region of panels with information. Each panel, however, can display only a few records due to panel size. To see all records, users can navigate to a second page called a subview. This topic illustrates how to modify those subview pages using Oracle Visual Builder Studio.

What's Inside the Subview?

A subview contains a list of all records that the panel, due to limited real estate, can't display.

For example, here's an example of an account detail page with 5 panels:



	y Address \$903 Ambassador Cathery Penysl.JAR41	TTE LA 70505 Website http://www.PronadelT.com	Phone +1 (\$10) 878-7765 Owner Sutan Morgan	C C
	Hierarchy Markansen herendy 3 Henebed Gener from Nar-Disector Research \$45.592.878	Contacts Journal States Vic Color Vic Col	Opportunities Marcineses 5354430 Accession Consect	Leads
Identify Key decision mak Gutps Atamu A/b/22 6:00 PM Autor 24 Archites (37)	View Account Henerchy	View All Contacts (1)	4/27/33 Houston Tesle plant \$0 01-Qualification 2/10/14 Vew All Opportunities (2/1)	Solar Installation

Notice how each panel displays only a few records.

To see all records, users can click the View All link that displays at the bottom of the panel.

Here's an example of some View All links. Note that after the link itself, a number indicates the number of total records listed on the subview.

Opportunities		Leads
Potential Revenue \$ 3,744,140		Diesel Engine Lead
June 2023 Opportunity \$ 0 01 - Qualification 7/18/23	0%	+1 (713) 660-8512 Grindelwald Opportunity Joshua Baker +1 (958) 555-1288 jbaker@pinnacle.com
Q2 Gas Generator Expansion \$ 271,865 07 - Closed 6/6/23	100%	Spartanburg New Site Lead Forrest Gump +1 (713) 660-8512
Diesel Engine Fall Opportunity \$ 0 01 - Qualification 6/25/23	30%	Battery Backup +1 (650) 506-7000
Houston Tesla plant \$ 0 01 - Qualification	20%	Solar installation
View All Opportunities (23)		View All Leads (8)

The subview displays all those records in a table.



supremoindustries				o 🕫
My Team's Accounts				+
tinnacle Technologies ♡ : Opports court Score 180 industry High technology Address 5		05 Website http://www.PienacleTr	com Phone +1 (510) 878-7765 Owner	Di Account Detallo Susan Morgan
 Try Add Address 				
- Golto Domine				This Account Child Account
Go to Overstew				This Account Child Account
Name ©	Amount 0	Close Date 0	Sales Stage 🗢	Win Probability 🗢
June 2025 Opportunity	\$0	7/18/25	01 - Qualification	0
Q2 Gas Generator Expansion	\$ 271,865	6/6/23	07 - Closed	100
Diesel Engine Fall Opportunity	\$0	6/25/25	01 - Quelification	30
Houston Tesla plant	\$0	6/22/23	01 - Qualification	20
Austin Tesla Plant	\$0	6/21/25	01 - Qualification	25
Q2 Solar Installation	\$ 60,800	7/28/23	02 - Negotiation	50
Q1 Desktop deal	\$ 87,500	6/7/23	01 - Qualification	18
	\$0	6/7/23	01 - Qualification	15
opty10				

What Can You Change in a Subview Table?

In Visual Builder Studio, you can modify the information that displays in a subview table.

You can:

- Add and remove columns
- Change the display order of columns in the table

This topic illustrates how to change the display order of columns in a subview table. We'll look at the Opportunities subview that's available from an account detail page.

Change the Display Order of Opportunity Subview Columns

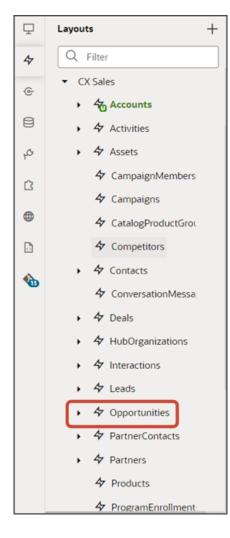
Let's change the display order of columns in a subview table. In this example, we'll switch the order of the sales stage and win probability columns on the Opportunities subview, accessed from the Opportunities panel on the Account detail page.



≡ ∮supremoindustries				o 🧳 👳
* My Team's Accounts				4n →
Pinnacle Technologies 🌣 : Opportunitie Account Score 180 Industry High technology Address 3905 Amb		05 Vietnite http://www.PienacleTr	com Phone +1 (510) 878-7765 Owner!	Susan Morgan
➤ Try Coll				
- Ga to Overview				This Account Child Accounts
Name 0	Amount ©	Close Date 0	Sales Stage 🗢	Win Probability
June 2023 Opportunity	\$0	7/18/23	01 - Qualification	0
Q2 Gas Generator Expansion	\$ 271,865	6/6/23	07 - Closed	100
Diesel Engine Fall Opportunity	\$0	6/25/23	01 - Qualification	50
Houston Tesla plant	\$.0	6/22/25	01 - Qualification	20
Austin Tesla Plant	\$0	6/21/23	01 - Qualification	25

1. In Visual Builder Studio, navigate to the Layouts tab and expand the CX Sales node > Opportunities.

The Opportunities node contains the rule sets for the Opportunities panel on the Account object.





2. On the Opportunities tab > Rule Sets subtab, click the Sub View Layout.

₽	Contractional x Constraints accounts-detail x Constraints x
47	Rule Sets (12) Fields Templates (13) Actions Event Listeners Events (9)
¢	Q Filter
8	 Dynamic Form
40	Page region where users can view opportunities in a panel.
ß	Panel Card Layout For Partner (CX sales) Page region where users can view opportunities on summary panel for Partner
•	Single Field Update Layout CX Sales Single Field Update Layout
	 Dynamic Table
	Dashboard Layout Cx sales Table displaying opportunities in dashboard.
	Picker Layout CX sales Layout for Opportunity picker
	Sub View Layout (CX Sales) Page region where users can view opportunities in sub view.

Both a default layout as well as a default rule are displayed for the Sub View Layout.

Ţ.	ß	accounts-detail × 🏠 Opportunities ×		
47	Ruk	e Sets (12) Fields Templates (13) Actions Even	t Listeners Events (?) Types Variables JavaScript JSON Settings	
œ	< 1	Rule Sets Sub View Layout (CX Sales) •		
8	youts	Q. Fitter + Layout	Display Logic 🗇	
ç,	5	Your extension doesn't have any layouts defined yet	+ Rule	Start by duplicating the built-in rule
8		From Dependencies		Tell me more
•		v oracle_cx_salesUI	From Dependencies (read-only)	*
۵		efouit defouit	IsDefault4 (CKSales)	8
٠			🔶 return 🖾 default 🖸	

3. Click the Duplicate Rule icon.

Display Logic 💿		
From Dependencies (read-only) ⑦		C Start by duplicating the built-in rule Tell me more
isDefault4 (CX Sales)		
return 🕅 default	R	



4. In the Duplicate Rule dialog, accept the default rule name or enter a new name. The name you enter here is both the rule name and also the layout name, so enter a layout name that makes sense for you.

Also, make sure that the **Also create a copy of the layout** check box is selected.

Duplicate Rule	×
Name *	
Also create a copy of the layout	
	Cancel Duplicate

5. Click Duplicate.

The new rule displays at the top of the list of existing rules, which means that this rule will be evaluated first at runtime. If the rule's conditions are met, then the associated layout is displayed to the user.

In this example, we're not adding any conditions which means that the associated layout will always be displayed.



- 6. Modify the rule's copied layout.
 - a. Click the Open icon to edit the copied layout.

Display Logic 🕐									
	+ Rule								
	isDefault4_copy 🧷	۵	6	~	^	đ			
-	Click to add condition								
	return 🗄 isDefault4_copy 🛛 🖛 🕞 🗙								
	From Dependencies (read-only) ③								
	isDefault4 (CX Sales)								
▲ ◇—	return 🖭 default								

b. In the list of fields in the layout, use the handle next to the win probability field to move it above the sales stage field.

Ţ	G	accounts-detail × 🍓 Opportunities	x
47	Rul	e Sets (12) Fields Templates (13)	Actions Event Listeners Events (9) Types Variables JavaScript JSON Settings
œ	<	Rule Sets Sub View Layout (CX Sales)	Layout isDefault4_copy 👻
8	Fields	Q Filter	Select fields to display
o,		Suggested Fields	III { } Name_hyperlink () Virtual field can be rendered only with a field template
ß		# PredictedWinProbability_c	
•		✓ # WinProb	A Revenue
		All Fields	III EffectiveDate
		A AccountPartyNumber	
Ф		A ActionsMenu	A SalesStage
		AiObjectHints	. A monage
		Assessments	# WinProb
		A AssetId	
		AssetNumber	Drop a field from fields palette
		A AssetProduct	

Here's a screenshot of the final location of the win probability field.

Select fields to display
 {
 A Revenue
 EffectiveDate
 # WinProb ×
 A SalesStage
Drop a field from fields palette

7. Click the Preview button to see your changes in your runtime test environment.



The preview link must include the application/container segments in the URL. If not, then change the preview link using the following example URL:

https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-detail? id=300000003513233&puid=7050&view=foldout

\$ supremoindustries				¢ ۵
My Beam's Accounts				
Pinnacle Technologies ♡ : Oppor	tunities			Account Details
ccount Score 180 Industry High technology Address		19905 Website http://www.Pinna	deT.com Phone +1 (510) 878-7765 Ou	ner Susan Morgan
 Try Log # Cell 				
Go to Overview				This Account Child Accounts
Name 0	Amount 0	Close Date 0	Min Probability 🗘	Sales Stage 🗘
June 2023 Opportunity	50	7/18/25	0	01 - Qualification
Q2 Gas Generator Expansion	\$ 271,805	6/6/23	100	07 - Closed
Diesel Engine Fall Opportunity	50	6/25/23	30	01 - Qualification
Houston Tesla plant	50	6/22/25	20	01 - Qualification
Austin Tesla Plant	50	6/21/23	25	01 - Qualification
Q2 Solar Installation	\$ 60,800	7/28/25	50	02 - Negotiation
Q1 Desktop deal	\$ 87,500	6/7/23	18	01 - Qualification
opty10	50	4/7/23	15	01 - Qualification

Configure the Create and Edit Layouts

This topic illustrates how to add or remove a field, and how to reorder fields, on the Create and Edit Account pages.



What's the Scenario?

Here's a screenshot of the Edit Account page.

lame Pinnacle Technologies	Type Prospect	
er 360 or fewer characters.		
Parent Company 🔹	Industry High technology	
Organization Type Code	Website http://www.PinnacleT.com	
Primary Contact Joshua Baker	Owner Susan Morgan	
Country, V US +1 510 878 7765 Ext.		
Country United States	•	
Address Line 1 3903 Ambassador Caffery Pkwy		
Address Line 2		
City Lafayette LA	Postal Code 70505	

In this example, we'll move the Website field to display to the right of the Name field.

Modify the Edit Account Layout

1. Navigate to the page that displays the area you want to extend.

In this example, navigate to the My Team's Accounts page, click an account record, then click **Account Details**.

- 2. To access Visual Builder Studio, you have one of two options:
 - Under the Settings and Actions menu, select **Edit Page in Visual Builder Studio**.

l (ጎ 🗘 📧
Settings and Actions	Sign Out
Personalization Set Preferences	
Administration Edit Page in Visual Bu	uilder Studio
Troubleshooting Run Diagnostics Test	S
Applications Help	
About This Applicatio	on

• If you don't see the Settings and Actions menu, then in the lower right corner of the page, hover over the Ask Oracle icon and click **Edit Page in Visual Builder Studio**.

Name Pinnacle Technologies	Type Prospect
ter 360 or fewer characters.	
Parent Company 👻 🚥	Industry High technology
Organization Type Code 👻	Website http://www.PinnacleT.com
Primary Contact Joshua Baker	Susan Morgan
Country. Phone H 510 878 7765 Ext.	
Country United States	•
Address Line 1 3903 Ambassador Cattery Pkny	
Address Line 2	
City State Lafayette LA	Postal Code 70505

3. If you're working on multiple projects, then select the Extend Redwood CX Sales project to keep your fragments extension separate from non-fragments changes.



4. When Visual Builder Studio opens, the Edit Account page displays in the canvas.

On the Structure panel, click the **accounts - Edit Layout** node.

The edit layout is highlighted in the canvas.

P										
4	Pag	e Designer Actions Event Lis	teners Ev	ents Types Variables JavaScript JSON Settings						
œ	ents	Q, Filter, Alt+F	≡ 0	(+) Desktop • 1024 × auto 84% •		Live Design Code				
8	Compon	Redwood Patterns								
q,	0	Bottom Drawer Template EB Card		Pinnacle Technologies		Cancel Save				
ß	Duta	🕼 Create Edit Drawer Template								
0		Detail Panel		Name Pinnacle Technologies	Type Prospect	•				
□ �₀		C Diagram Node Empty State		Parent Company ••••	Industry High technology	•				
			=	Organization Type Code	viebste http://www.PinnacleT.com					
		cx-edit cx-edit-impl cx-edit-impl		Primary Contact Joshua Baker	Owner Susan Morgan	•				
		accounts - Edit Layout		Country, V US +1 510 878 7765						
	Structure			Country United States		• •				
	~		Page	cv-edit cv-edit-impl accounts - Edit Layout		@ 7.89 s				

5. On the Properties pane, click the Edit Layout rule set.

<pre> accounts - Edit Layout Application Comp </pre>	Properties
	S
Page Region where user can edit an account	
Suggested Actions	
∳_ Open Rule Set Editor	
Go to cx-edit-impl	
Layout def accounts Object eq getall_accounts	
Rule Set	
Layout Preview	
Resolved by display logic	

The Accounts layout tab > Rule Sets subtab displays. The Rule Sets subtab includes both a default layout as well as a default rule. Let's create a new rule.



6. Click the Duplicate Rule icon.

Ģ	🗅 accounts-edit x 🐴 Accounts x		
4	Rule Sets (20) Fields Templates (20) Actions Event L	Isteners Events (11) Types Variables JavaScript JSON Settings	
۲	C Rule Sets Edit Layout (CC Sales) *		
8	Q. Filter + Layout	Display Logic 🗇	
ø,	5 Your extension doesn't have any layouts defined yet	+ Rude	Start by duplicating the built-in rule
8	From Dependencies		Tell me more
•	v oracle_cx_salesUI	From Dependencies (read-only)	4
	🛐 default	IsDefaultEdit (CKSales)	(i)
•		🔶 return 🖹 defoult 🔯	

7. In the Duplicate Rule dialog, accept the default rule name or enter a new name. The name you enter here is both the rule name and also the layout name, so enter a layout name that makes sense for you.

Make sure that the **Also create a copy of the layout** check box is selected, and then click **Duplicate**.

Duplicate Rule	×
Name * isDefaultEdit_copy	
Also create a copy of the layout	
	Cancel Duplicate

The new rule displays at the top of the list of existing rules, which means that this rule will be evaluated first at runtime. If the rule's conditions are met, then the associated layout is displayed to the user.

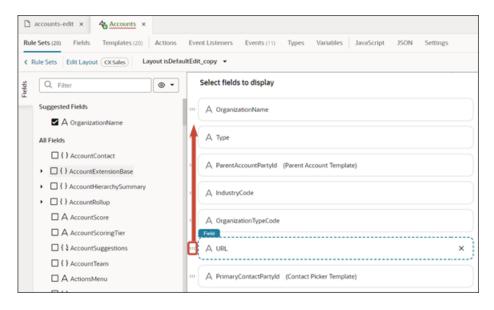
In this example, we're not adding any conditions which means that the associated layout will always be displayed.



8. Let's modify the rule's copied layout. Click the Open icon to edit the copied layout.

Display Logic 🗇									
-	+ Rule								
	isDefaultEdit_copy 🖉		G	×	^	Û			
	Click to add condition								
	return 🕮 isDefaultEdit_copy 🛛 🕶 💽 🗙								
	From Dependencies (read-only)								
	isDefaultEdit (CX Sales)								
▲ ◇—	return 🖽 default								

9. In this example, we want to move the position of the Website field. Locate the Website field and use the handle to reposition the field so that it displays after the Name field.



10. Click the Preview button to see your changes in your runtime test environment.

ß	ŝ	⊳	٢	Q	Publish	≡
			-			

The preview link must include the application/container segments in the URL. If not, then change the preview link using the following example URL:

https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-edit? id=30000003513233&mode=edit&puid=7050

This screenshot illustrates the new location of the Website field.

Name Pinnacle Technologies	Website http://www.PinnacleT.com	
ter 360 or fewer characters.		
Type Prospect	Parent Company -	•••
Industry High technology	Organization Type Code	•
Primary Contact Joshua Baker	Owner Susan Morgan	•••
Country.		
Country United States		•
Address Line 1 3903 Ambassador Caffery Pkwy		
Address Line 2		
City State	Postal Code	

Link to a Smart Action Using a URL

You can construct a URL that calls a smart action in the Redwood version of Sales. Construct this URL whenever needed and then use it as a deeplink. Depending on the smart action added to the URL, clicking the link will either execute a smart action without involving a UI (to delete a record, for example) or navigate directly to an open drawer on a Sales page (to create a record, for example).

To construct the URL, append the smart action ID as a parameter to the detail page URL.

- 1. Obtain the smart action ID. You can retrieve the smart action ID from Application Composer.
- 2. Obtain the URL of the detail page. For example:



https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-detail? id=300000008600956&puid=38005&view=foldout

3. Append the smart action ID parameter as follows:

&actionId=<smart action ID>

4. The resulting URL can be used to link to a smart action:

For example:

https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-detail? id=300000008600956&puid=38005&view=foldout&actionId=SDA-Delete-accounts

Note that once the action is completed, the URL changes to:

https://<servername>/fscmUI/redwood/cx-sales/application/container/accounts/accounts-detail? id=300000008600956&puid=38005&view=foldout&actionId=completed

